

4690-1

\$35.00

ANNUAL ISSUE

NPN

National Petroleum News

1985

fact book

213 US CONGRESS 45250 HPB
SRI ACQUISITION
ACQUISITION SRI
CONGRESSIONAL INFO SERVIC
45201 EAST MAY STE 80
BETHESDA MD 20814

WHEN IT COMES TO MPD OPTIONS THERE'S ONLY ONE CHOICE.

Gilbarco offers more MPD options than anyone else. Because now, we offer the MPD-1 in an eight-hose model, capable of handling four grades of gasoline. Of course, the MPD-1 is still available in the six-hose model, too.

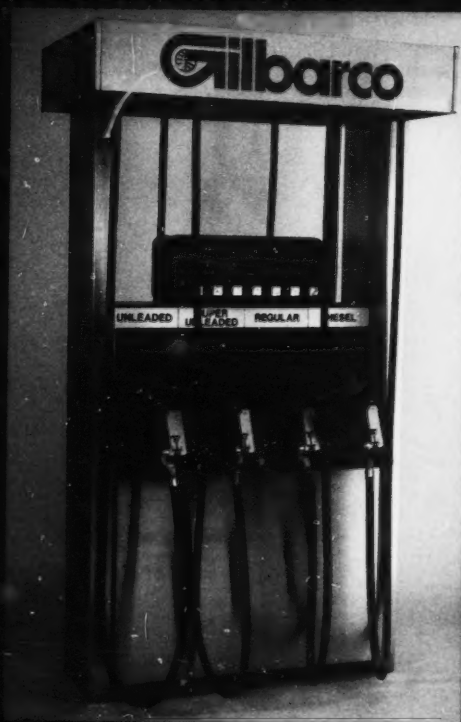
Six-hose or eight-hose, the MPD-1 gives you the most popular features of our top-of-the-line MPD-2, but at a lower price.

Features like: Electronic price posting from the console. Cash/credit or customer preset options on the dispenser. State-of-the-art electronics with the latest display technology. And more.

Both MPD-1 and 2 offer rugged single frame construction. Contemporary design. And many customer friendly features such as large, conveniently located vapor-style nozzle boots. MPD-2 has many additional features.

And, since introducing the MPD concept, Gilbarco has sold more units than all other manufacturers combined. Our MPD's offer the most wanted features and options.

So choose the company with all the options. Call your Gilbarco distributor today. Or contact Gilbarco, Inc., Post Office Box 22087, Greensboro, North Carolina 27420, USA. Telephone 919 292-3011.



The MPD-1 eight-hose dispenser.

Gilbarco



**"THE
ORIGINAL
IS STILL
THE BEST"**



MANHOLES

**Whatever your requirements,
Universal is the way to go!**

Our product line is made up of over 100 different manhole adaptors and caps, meeting every need, from 18" to 36" diameter. Available in round, square or rectangular styles. Built rugged, heavy-duty manhole adaptors in a full range of sizes and depths. Universal will also design custom models to meet your special requirements.

Contact your local Distributor or call the Universal Hotline today!
201/351-0606



"The original is still the best!"
UNIVERSAL VALVE COMPANY
478 Schiller Street Elizabeth, New Jersey



SAFETY FAST

**UNIVERSAL
SAFETY VALVES
SHRINK DOWNTIME!**

Can be reset against line pressure in submerged pump systems.

UL listed and approved by all major oil companies. Choose from two body styles and four replaceable ends.

Fill-up on the facts today. Contact your local distributor or call the Universal Hotline.
(201) 351-0606

"The original is still the best!"



**UNIVERSAL
VALVE
COMPANY**

478 Schiller St. Elizabeth, New Jersey



TIGHT FILL ADAPTORS & CAPS

WHATEVER YOU NEED, WE'VE GOT IT!



Universal's patented flat-top caps exceed only 5/8" above adaptor when in closed position, allowing maximum clearance in adaptor and manifold installations, when space becomes critical due to heaving or settling. Durable construction assures water and vapor proof sealing.

Choose from a complete range of adaptor sizes in top seal and side seal models. Caps available in flat-top, twist-on, lever and step-on types. Contact your local distributor or call the Universal Hotline today. (201) 351-0606



"The original is still the best!"
UNIVERSAL VALVE COMPANY
478 Schiller Street Elizabeth, New Jersey



LIQUID LEVEL GAUGE SAMPLER

**Now, direct visual inspection
of samples from any tank!**

MEASURE liquid levels
SAMPLE tank contents
CHECK water bottom phase separation
DETECT foreign substances
(for gasoline, diesel, fuel oil and most liquids)

Contact your local dealer or call the Universal Hotline today! (201) 351-0606

"The original is still the best!"



**UNIVERSAL
VALVE
COMPANY**

478 Schiller St. Elizabeth, New Jersey





Looking Things Over

Something we've always wanted to do in our own right is getting off the ground in this issue of *NPN Factbook*. It is our very own Share-of-Market Report, and we have high hopes and ambitions for it as an annual feature in future issues.

This year we are introducing *NPN's* share-of-market data for the top 12 companies, broken down along traditional lines, i.e. total gallonage and national market share. Next year, if all goes well, we hope to come back with an expanded version of this report so that once again the *NPN* market share numbers will be the most authoritative around.

Our formula for this year's Share-of-Market Report differs from others that have been available in the past—ours is based on the *total* gasoline sales of the principle gasoline suppliers. In other words, we are working from the amounts of gasoline they sold as automotive fuels back upstream. The measurements are on a refinery-gate basis, not from a retail pump viewpoint. Thus, we have reason to believe that the *NPN* data is a more accurate reflection of gasoline marketing and share-of-market rankings than anything else around.

There's a lot of new data elsewhere in the *Factbook*. For example, we have some interesting pricing data from the Bureau of Labor Statistics. And, we have, for the first time, some intriguing regional share-of-market perspectives for both the U.S. and Canada from MPSI Americas Inc. of Tulsa, Okla. For fuel oil marketers there are some profiles from our sister publication, *Fuel Oil News*. And, from Hunter Publishing Co. comes the Service Job Analysis, the triennial in-depth survey of the auto repair/maintenance market.

As always, this year's *Factbook* is the end result of tireless efforts by our data-gathering guru and executive editor J. Richard Shaner. We are indebted to his many long hours, scores of telephone calls and pages upon pages of number crunching. Thanks also to production coordinator Timothy R. Green, who rounded up the distribution and retail outlet numbers and assembled the issue's masses of data in a readable and presentable fashion.

All in all, the 1985 *Factbook* is an especially valuable reference book for industry, government, statisticians and all other users. —Marvin Reid

NATIONAL PETROLEUM NEWS

Established in 1909

Editorial Staff:

Editor

Marvin Reid

Executive Editor

J. Richard Shaner

Managing Editor

Thomas Olson

Staff Reporter

Dan Larson

Factbook/Production Coordinator

Timothy R. Green

Contributing Correspondent

Mark Emond

Washington Correspondents

Thomas Goldsmith

Dennis Wharton

TBA Correspondent

Donald M. Smith

Columnists

Sam Borenkind

Irving Blackman

Design Consultants

Marcus Design Inc.

Executive Staff:

President

Albert Joseph

Executive Vice President

Robert E. Yarbrough Jr.

Publisher

Wm. D. Straub

Editorial Director

James J. Halloran

Circulation Director

Edward Robinson

Circulation Manager

Charlie Larson

Research and Promotion Manager

Gene Zack

Production Manager

Arthur R. Steitz

Classified Sales

Elizabeth Schmitt

Manager of Marketing Services

Janelle Joseph

Marketing Services Assistant

Dorothy Paprocki

Washington Bureau:

Thomas Goldsmith and Dennis Wharton,
1483 Chain Bridge Rd., McLean, VA 22101.
(703) 448-0337

Regional Reporters:

East Coast: J. Richard Shaner, P.O. Box 1476,
Morristown, NJ 07960. (201) 428-2902.

Midwest: Dan Larson, 950 Lee St.,
Des Plaines, IL 60016. (312) 296-0770

South: Marvin Reid, 3622 Parkmont,

Mesquite, TX 75150. (214) 681-8197

West: Mark Emond, P.O. Box 8130, Anaheim,
CA 92802. (714) 491-9194

National Petroleum News (NPN) (ISSN 0149-5267) is published monthly by Hunter Publishing Co., 950 Lee Street, Des Plaines, Illinois 60016. (312) 296-0770.

© National Petroleum News

Second class postage paid at Des Plaines, Illinois and additional mailing offices.

Subscriptions are solicited only from executive, management and supervisory personnel at the supplier and wholesale level of oil marketing, engaged in the distribution, merchandising, transportation and storage of petroleum, TBA products, and convenience-store items. Position, company and segment of industry must be indicated on subscription orders.



Basic subscription rates for one year to individuals in the petroleum marketing industry are: U.S. \$44; Canada \$53 (U.S. \$); Elsewhere \$84.50 (U.S. \$). Non-industry personnel rates for one year are: U.S. \$59; Canada \$64.50 (U.S. \$); Elsewhere \$96 (U.S. \$). Single copies: \$4.50 U.S. Mid-June Factbook issue, \$35 in the U.S.; \$45 in Canada. The publisher reserves the right to accept or reject any subscription. (R) Title registered in U.S. patent office. Send change of address notice, correspondence regarding subscription service or subscription orders to: Circulation Department, NATIONAL PETROLEUM NEWS, 950 Lee Street, Des Plaines, Illinois 60016. Subscribers should notify Circulation Department promptly of any change of address, giving old as well as new address. If possible, enclose an address label from a recent issue of the magazine. Or call (312) 296-0770, 9 a.m. to 4 p.m. CST. Allow one to two months for change to become effective.

Postmasters: Send form 357® to NATIONAL PETROLEUM NEWS, 950 Lee Street, Des Plaines, Illinois 60016.

Three more reasons to leave the rebuilds behind

The Nozzle™ from OPW

So precisely engineered and efficiently manufactured, it makes history out of the rebuilds!

The OPW 11-A — Built to take abuse, the 11-A from OPW features a Duratuff™ lever and lever guard designed to be "truck-stop-tough." The 11-A's modern shape and lightweight, aluminum body comes with a full-hand insulator in many attention-getting colors to match your

marketing needs. Priced to compete with the rebuilds, the 11-A is engineered to outlast some rebuilds as much as two-to-one.

The OPW Traffic Builder —

Designed to sell more than just fuel, OPW's Message Center is available to help you build in-store traffic on both 11-A and 11-B configurations.

With the OPW Message Center, you turn your low-margin drive-away into a high-margin buyer.

Dynamic, customized messages communicate your in-store specials, seasonal merchandise or new product lines. Put a billboard in your customer's hands with the "Traffic Builder."

The OPW 11-B — The Nozzle™ of the future is yours today with the 11-B. When the pump shuts off, the 11-B closes automatically and cannot be re-opened until the system is repressurized. Designed for unattended self-serve and pre-pay use, the 11-B helps reduce the risk of spills and cuts inventory losses.

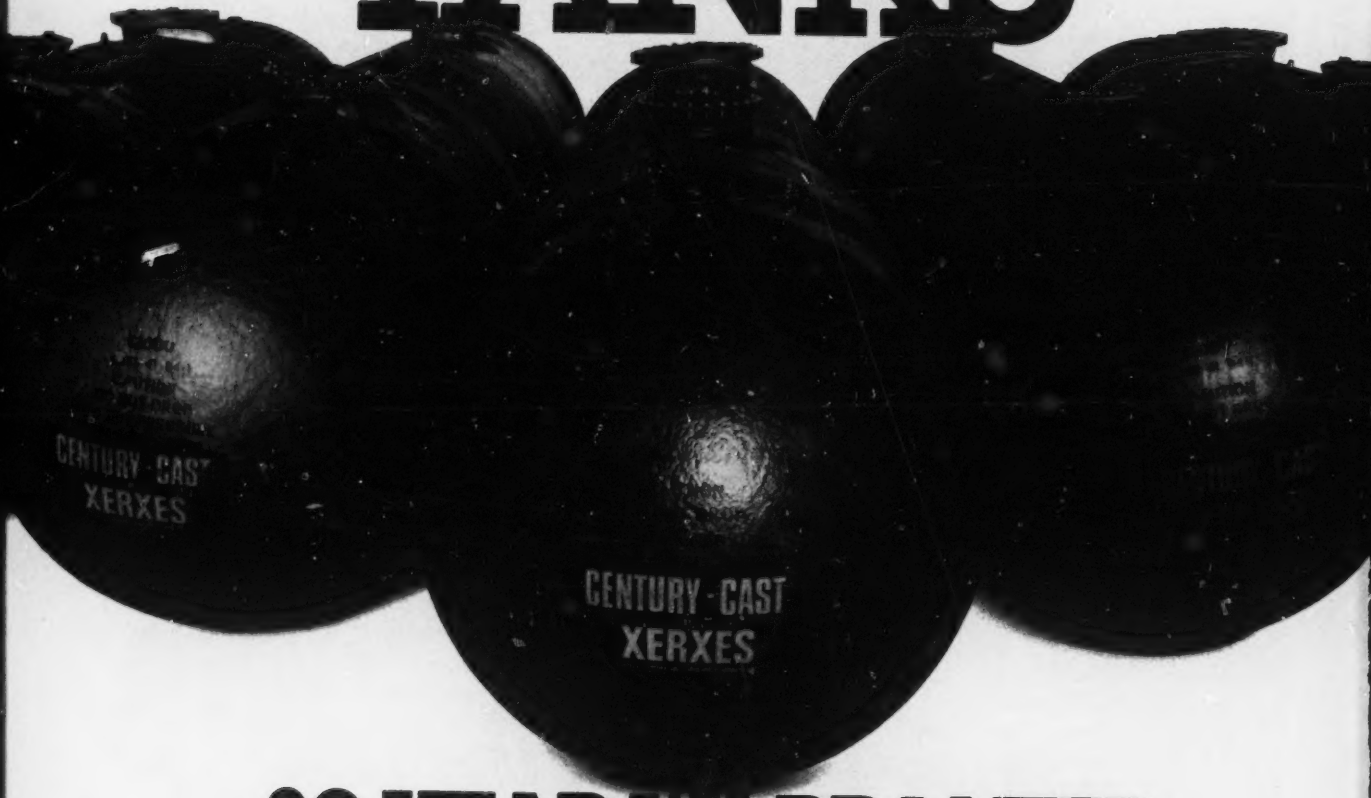
The Nozzle™ from OPW...the end of the rebuilds. For more information, contact your OPW Distributor today, or write or call:

DOVER CORPORATION / OPW DIVISION

9393 Princeton-Glendale Road, P.O. Box 405003,
Cincinnati, Ohio 45240-5003 (513) 870-3219

© 1985-OPW

THE 30 YEAR TANKS



30 YEAR WARRANTY*

On Structural Defects or Failures • External Corrosion • Internal Corrosion

*For full information on the Xerxes® Double Wall Tank Limited Warranty, write or call:

XERXES

CORPORATION

7901 Xerxes Avenue S., Minneapolis, MN 55431 (612) 887-1890

Manufacturing facilities in Anaheim, CA • Bartow, FL • Seguin, TX • North Ridgeville, OH • Penns Grove, NJ

NPN

Features

Annual Reports

A look at the leading corporations, their finances, their rankings, and key operating details **Page 13**

Branded Retail Outlet Census

NPN's exclusive report on gasoline marketing in the U.S., including state-by-state outlet totals **Page 44**

Capital Spending

A report on what the major oil companies spend, including a five-year forecast and 10- and 20-year overviews **Page 31**

Distribution

NPN's exclusive report on how oil companies handle product distribution **Page 35**

International

A bird's eye view of production, refining and marketing data around the world, with special emphasis on Canada .. **Page 71**

Prices

Complete scorecards on domestic and international prices for gasoline, distillate and residual heating oils, diesel, kerosine and crude **Page 97**

Retail Market Share

Exclusive nationwide gasoline share-of-market figures for the top marketers **Page 124**

Service Job Analysis

Hunter Publishing Company's triennial in-depth survey of the auto repair/maintenance market **Page 156**

TBA/Aftermarket

Up-to-the-minute data and forecasts for jobbers and retailers on the multi-million-dollar aftermarket business **Page 152**

Association Directory

Addresses/phone numbers of oil marketing and related associations and their key personnel **Page 169**

Marketing Management Directory

A list of oil marketing companies from the majors to jobberships, with addresses, phone numbers and key personnel **Page 175**

A

Accessories

See TBA/Aftermarket

Advertising

How oil spends ad money 18

Aftermarket

See TBA/Aftermarket

Annual Reports

By company 14
Earnings, 1984 vs. 1983 16
Earnings, 1983 vs. 1982 16
Companies ranked by total assets, sales, income 13

Associations

Directory, personnel 169

Automotive

Consumer spending 118
Gasoline consumption 88
Licensed drivers by sex, state .. 21
Motor oil 84
Passenger car efficiency 22
State/driving relationships 23
Vehicle registrations by state .. 20

B

Batteries

See TBA/Aftermarket

Brand Names

Gasoline/motor oil 26
Canadian gasoline/motor oil ... 76

Bulk Plants, Terminals, Etc.

See Distribution

Buses

See Automotive

C

Canada

Autos per household 79
Brand names 76
Branded retail outlets by province/company 77



Champion Copper Plus. All Plus.No Fuss.

Copper alone does not make a spark plug superior. That's why Champion added more than copper. We added the plus. In fact, we added several.

We added design and technological improvements that allowed us to lengthen the insulator nose. Which vastly improved our plug's fouling protection. We also gave it a broader heat range, surer

starts, and superior performance in stop-and-go city driving.

Then we added the "plus-de-resistance." An exclusive Performance Guarantee: "If you don't think your engine runs better with fresh Champion Copper Plus® spark plugs, return them to Champion within sixty days and we'll refund your money."* No fuss for you. No fuss for your customers.

If you want to stock superior spark plugs, don't just settle for copper. Stock the plus. Champion Copper Plus. Get all the plus with none of the fuss.

*Offer expires December 31, 1985. Aviation and industrial plugs excepted.



**NOTHING
SPARKS
LIKE A
CHAMPION**

©1985 Champion Spark Plug Company
Toledo, OH 43661-0001

COPPER PLUS

THE PLUS FOR MAXIMUM PERFORMANCE

Distribution by company	76
Licensed drivers	79
Gasoline outlets by province	75
Gasoline sales	75
Heating fuels by province/type	79
Market share by type of outlet	78
New vehicle sales	79
Petroleum supply/demand	75
Premium ratios	75
Product sales by province/type	75
Sales of car batteries	79
Vehicle registration by province/ type	79

Capital Spending

By industry segment	33
Five-year forecast	32
Historical overview	31

Commission AgentsSee **Distribution****Convenience Stores**

Data	120
Gasoline sales	121,122
Number/percent of stores selling gasoline	121,122
Population	121,122
Sales/volume	122

Crude Oil

Inventories	135
Imports	138
Origin of imports	138
Production in 20 leading nations	72
Production, U.S.—1974- 1983	133
Reserves in 20 leading nations	72
Stocks	126
Wells, all-time, U.S.	143
Well completions, proved reserves, supply	138
World prices—1983-1985	105
World production by area	71
World reserves by area	71
Yields from a barrel	144

D**Demand**See **Supply/Demand****Diesel**See **Motor Fuel/Diesel****Directories**

Associations	169
Oil companies/marketing management	175
Refineries by company	163
Refineries by state	159
Washington Guide	209

DistillatesSee **Fuel Oil****Distribution**

By company, U.S.	35
By company, Canada	76

Distribution/Outlets

Branded retail outlets by state/ company	44
Branded retail outlets—Canada, by province/company	77

E**Employment**

Number of employees by category	53
------------------------------------	----

F**Financial Reports**See **Annual Reports****Forecasts/Trends**

Auto parts/services	154
Convenience stores	120
LP-gas	81
Lube oil sales	85
Motor oil	84
Self-serve vs. full serve	115
Service stations	111
Supply/demand	140,142
Tires/batteries	152

Fuel Oil

Dealer population by state	66
Distillate sales by state/use	56
Distillate sales by use	65
Distillate use by category	55
Gas heat equipment shipments	55
Homes with gas heat	55
How new homes are heated	55
industry profile	68
Kerosine sales by state/use	60
Kerosine use by category	55
Residual sales by use	62
Residual sales by state/use	65
Residual use by category	55

G**Gasoline**See **Motor Fuel/Gasoline****Government**See **Washington Guide****Grease**See **Lubricants****H****Heating Oil**See **Fuel Oil****I****Imports**

Crude oil	138
Crude, residual, other	138

International

Supply/demand forecast	73
------------------------	----

J**Jobbers**See **Distribution****K****Kerosine**See **Fuel Oil****L****Licensed Drivers**See **Automotive****LP-Gas**

Consumption	82
Sales by year/use	81
Supply	82
Trends	81

Lubrication

Automotive sales	85
Industrial sales	85
Demand for automotive lube base oils	85
Demand for lubricating base oils	85
Motor oil consumption	84
Motor oil distribution channels	84
Motor oil outlet market share	84
Motor oil outlook	84
Sales projections	85

M**Marketing Areas**See **Distribution and Distribution/
Outlets****Marketing Management**

Directory/personnel	175
---------------------	-----

- Motor Fuel/Diesel**
Sales by state 95
- Motor Fuel/Gasohol**
Consumption by states—1983 . 92
Consumption by states—1984 . 93
- Motor Fuel/Gasoline**
Consumption by states 88
Consumption by states,
ranked 89
Octanes 90
Retail prices 97,98,99,101
- Motor Oil**
See Lubrication
- Motor Vehicles**
See Automotive
- O**
- Octanes**
See Motor Fuel/Gasoline
- Oil Heat**
See Fuel Oil
- Outlets**
See Distribution/Outlets
- P**
- Prices**
Diesel fuel and household
kerosine—
international 108
Distillate fuel oil, supplier
prices 104
Gasoline, by grades/months . 101
Gasoline, by type of seller . 102
Gasoline and fuel oil—
international 107
Product, for resale 103
Product prices to end-users . 103
Residual fuel oil, selected
states 100
Residual fuel oil supplier
prices 104
Retail gasoline prices for selected
areas 97,98,99
Spot market product prices . 106
World crude oil—1983-1985 . 105
- R**
- Refineries**
Refineries and capacities by
state 159
Refineries and capacities by
company 163
Refinery closings 166
- Repair**
See Service Job Analysis and
TBA/Aftermarket
- Residual Oil**
See Fuel Oil
- Retail Market**
Convenience store data 120
Convenience store gasoline
sales 121,122
Convenience store
population 121,122
Convenience store volume . 122
Market share by type of outlet . 116
Outlet rankings 119
Self-service appeal 115
Service station customers . 118
Service station deactivation—new
vs. closed 114
Service station dollar
volumes 118
Service station
population 111,112,113
Service station rank in sales . 118
Service station sales to passenger
cars 118
- S**
- Self-Service**
See Retail Market
- Service Job Analysis**
Jobs performed 156
- Service Stations**
See Retail Market
- Share of Market**
National market shares by
company 124
Historical overview 124
- Storage Capacity**
Primary 147
Secondary/tertiary 148
- Supply/Demand**
Consumption by states 137
Crude and product
inventories 135
Crude oil imports 138
Days supply of fuel oil 131
Days supply of gasoline 131
Domestic supply of oil
products 138
Domestic supply trend 135
Imports—crude, residual,
other 138
Origin of imports 138
PAD districts/Bureau of Mines
districts 145
- Petroleum products supplied . 132
Refinery/Bulk terminal stocks
by state/PAD 130
Refinery operations data 135
Role of imports in domestic
demand 136
Stocks of crude oil 126
Stocks of distillate fuel oil . 127
Stocks of distillate fuel oil by
month 128
Stocks of motor gasoline . 127,128
Stocks of motor gasoline by
month 128
Stocks of residual fuel oil . 126,128
Stocks of residual fuel oil by
month 128
Supply/demand forecast . 140,142
Supply and production—principle
products 138
Total petroleum products supply by
month 136
U.S. crude oil production, 1974-
1983 133
U.S. estimated petroleum
balance 135
- T**
- Taxes**
State collections 150
Federal collections 150
- TBA/Aftermarket**
Antifreeze sales 153
Batteries, replacement 152
Battery shipments 152
Chassis lubrication intervals . 154
Drain intervals—crankcase/
automatic transmission . 154
Outlook for auto parts/
services 154
Outlook for tires/batteries . 152
Service Job Analysis 156
Tire shipments 153
Where batteries are sold . 152
Where customers get
tuneups 153
- Tires**
See TBA/Aftermarket
- W**
- Washington Guide**
Government agencies,
Congress 209
- Y**
- Yields**
Product from barrel of crude . 144

When the going's rough... get tough with **CITGO Lubricants.**

When it's so cold outside it crackles,
do you have confidence in the lubricant you use?

For more than 50 years, the people at CITGO have been developing products to meet the tough, maximum performance demands of the industrial, automotive and aviation industries.

CITGO understands the need for a tough lubricant. Our high-quality base stocks and additives make CITGO products tough.

CITGO's *Big Red* 2-Cycle engine oil. It has become the performance standard for the industry. Our standards are so high that many world famous sport equipment manufacturers put their own name on CITGO 2-Cycle engine oil. We supply over 20% of the 2-Cycle Engine Oil in the U.S. market.

CITGO is tough on developing new

products. We specialize in the industrial and full line of high-quality products including motor oils, gear oils, hydraulic fluids, and more.

CITGO's *Big Red* metal working fluids. They're tough and work. CITGO's *Big Red* is used in its toughest applications. Our customers and distributors. Our field professionals provide a full range of technical services supported by a seasoned staff of product technology specialists.

Let the people at CITGO help you.
Call or write Tom Spann, Box 3758,
Tulsa, OK 74102. (918) 495-4782



**the
Tough
Guys**

Working for you...

CITGO Petroleum Corporation/A Subsidiary of The Southland Corporation

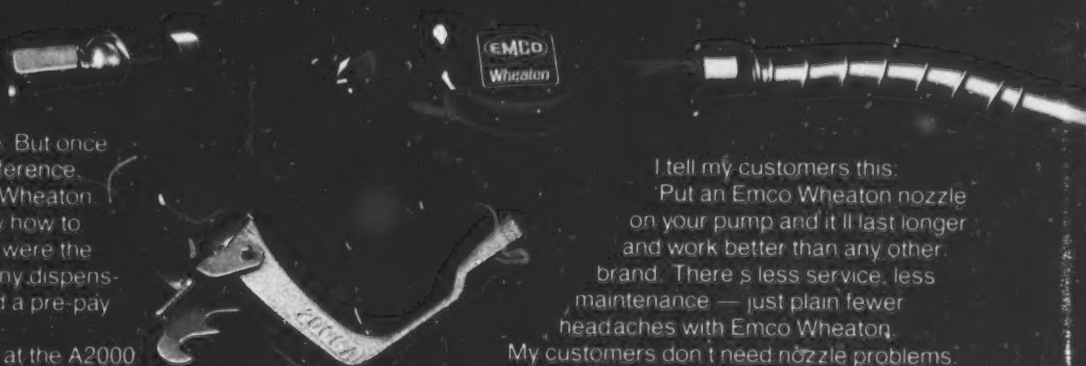


**"Once I show them the difference,
my customers prefer
Emco Wheaton."**

A lot of people come into my store looking for any brand of nozzle. But once I show them the difference, they choose Emco Wheaton.

Those guys know how to build nozzles. They were the first with to-the-penny dispensing. The first to build a pre-pay self-service nozzle.

Take a close look at the A2000 and the Marshall nozzles. They're the only nozzles with one-piece cast housings — they can take the abuse. They're the only nozzles with stainless steel shut-offs. And they've got the most accurate to-the-penny dispensing I've ever seen. But the real bottom line is value.



I tell my customers this: Put an Emco Wheaton nozzle on your pump and it'll last longer and work better than any other brand. There's less service, less maintenance — just plain fewer headaches with Emco Wheaton.

My customers don't need nozzle problems. That's why they switch to Emco Wheaton.
— Bob Moore, D & M Pump,
Houston, Texas

**EMCO
WHEATON**

For more information call or write:
Emco Wheaton, Inc., Chamberlain Blvd., Corneaut, OH 44030
1-800-321-5233 - Ext. 266 - In Ohio, call collect, 216-599-8151

Ranking the Top Marketing Companies

	Total Assets		Total Sales		Net Income		Net Sales Ranking Among 500 U.S. Corporations	
	1984	1983	1984	1983	1984	1983	1984	1983
Exxon Corp.....	1	1	1	1	1	1	1	1
Mobil Oil Corp.	2	2	2	2	6	7	3	3
Texaco Inc. (a)	3	3	3	3	5	8	6	6
Chevron (b)	4	5	5	5	4	4	11	9
Standard Oil (Indiana)	5	4	4	4	2	2	10	8
Shell Oil Co.	6	7	7	7	3	3	13	13
Atlantic Richfield Co.	7	6	6	6	10	5	12	12
Tenneco Inc. (c)	8	9	9	10	9	11	19	19
Standard Oil (Ohio)	9	10	11	11	5	6	24	25
Phillips Petroleum Co.	10	11	8	8	7	10	17	16
Sun Co.	11	12	10	9	11	14	20	17
Unocal.	12	14	12	12	8	12	27	31
Amerada-Hess Corp.	13	15	13	13	14	15	41	39
Diamond Shamrock Corp.	14	16	15	15	13	21	83	89
Ashland Inc. (d)	15	17	14	14	19	19	42	45
Kerr-McGee Corp.	16	18	16	16	17	18	111	108
Pennzoil Corp.	17	19	17	18	15	16	147	163
Murphy Oil Corp.	18	20	19	17	16	17	167	157
American Petrofina.	19	21	18	19	18	20	173	176

(a) Includes Getty Oil (ranked 13th in 1983) acquired 2/17/84.

(b) Includes Gulf Oil (ranked 8th in 1983) acquired 6/15/84.

(c) Corporate; includes Tenneco Oil Co.

(d) Fiscal ends 9/30

Source: Fortune, 500 largest U.S. corporations, April 29, 1985.

Old Order Changes—The Ranks Thin Out

There is no question that Exxon is the nation's No. 1 oil company. With assets of \$63.2-billion, sales of \$90.9-billion and net earnings of \$5.5-billion in 1984, its physical and financial dimensions are so big that it simply dominates everything in sight.

Ranking the other oil companies is always a touchy question, however. *NPN Factbook* uses assets as its key determining factor; business/financial publications use annual sales, but those move up and down so much that they lack real benchmark substance. The same applies to the utilization of net profits as a yardstick.

There were two significant changes in the 1984 standings: Chevron, with its acquisition of Gulf, moved past Standard of Indiana to the No. 4 position, and Shell displaced Atlantic Richfield as No. 6. The Texaco/Chevron/Amoco/Shell positions may be revised again later this year, however, as the dust settles on the Getty and Gulf acquisitions and the required divestitures are firmly locked in place.

Mergers and megamergers continued to change the face of the oil industry in 1984. At this point in time, there are only 19 oil marketing companies left with assets of more than \$1-billion. Getty and Gulf fell by the wayside in 1984, and Citgo, Marathon and Conoco did likewise in years previous.

Phillips Petroleum almost became a victim of the merger mania in late 1984 and early 1985 when financial "entrepreneurs" mounted hostile takeover campaigns against it. Phillips survived both sieges, but at a price that will force it to trim its sails significantly. There was talk in some circles that Phillips may have to sell off some of its marketing facilities to pay the bills.

Market raiders launched an attack on Unocal Corp. in early 1985, and this one seesawed back and forth through the first half of the year with neither side conceding an inch to the other. According to Wall Street appraisals, the spread of takeover fever will hinge on the outcome of the Unocal fight. If Unocal wins, the forces of the raiders will be blunted sufficiently to bring about a quick easing of the fever. If Unocal loses, then no oil company will be safe—not even an Exxon, despite its wealth and size.

Classified as "sitting ducks" by the financial community were companies such as Amerada Hess, Sun, and Diamond Shamrock. Others were named too, and there was a rash of anti-takeover bylaws and procedures adopted by many companies, including Mobile, Sun and Hess.

Six companies earned more than \$1-billion in 1984—two less than the preceding year. They were Exxon, Mobil, Amoco, Chevron, Shell and Sohio.

Oil Company Annual

	Gross Sales-Operating Revenues (a)				Net Income	
	(add 000)		% Change		(add 000)	
	1984	1983	1984 vs. 1983	1984 vs. 1979	1984	1983
Amerada Hess Corp.	\$ 8,353,752	\$ 8,422,076	0.8%	22.6%	\$ 170,455	\$ 205,347
American Petrofina	2,125,853	2,069,122	2.7	33.9	45,092	55,280
Ashland Inc.	8,500,000	8,108,000	4.8	26.1	(172,000)(b)	97,000
Atlantic Richfield Co.	24,654,000	24,912,000	-1.0	47.8	567,000	1,548,000
Chevron Corp.	27,830,000	28,411,000	-2.0	-10.0	1,534,000	1,590,000
CITGO Petroleum Corp. (c)	5,427,092	2,764,257	96.3	—	15,498	22,719
Crown Central Petroleum Corp.	1,612,236	1,668,345	-3.4	—	504	4,024
Diamond Shamrock Corp.	4,483,200	4,026,107	11.4	362.6	242,200	(56,163)
Exxon Corp.	97,288,000	93,447,000	4.1	14.7	5,528,000	4,978,000
Kerr-McGee Corp.	3,537,000	3,507,650	0.8	30.8	65,000 (d)	118,412
Marathon Oil Corp. (e)	10,185,000	9,278,000	9.8	—	1,274,000	1,138,000
Mobil Oil Corp.	60,474,000	58,998,000	2.5	32.9	1,268,000	1,503,000
Murphy Oil Corp.	2,264,652	2,448,158	7.4	41.9	96,167	127,436
Phillips Petroleum Corp.	15,756,000	15,411,000	2.2	61.7	810,000	721,000
Shell Oil Corp.	20,898,000	20,705,000	0.9	43.7	1,772,000	1,633,000
Standard Oil Co. (Indiana)	29,008,000	27,635,000	5.0	55.9	2,183,000	1,868,000
Standard Oil Co. (Ohio)	12,251,000	12,067,000	1.5	54.8	1,488,000	1,512,000
Sun Co.	15,397,000	15,523,000	-0.8	44.4	538,000	453,000
Tenneco	14,890,000	14,499,000	2.6	37.2	631,000	716,000
Texaco Inc.	47,935,000	40,068,000	19.6	22.6	306,000 (f)	1,233,000
Union Oil Co. of California	11,530,700	10,690,500	7.9	52.4	700,400	625,900

(a) Excluding taxes

(b) Operating income (ex-taxes/interest) was \$252,000,000 before write-offs.

(c) Owned by The Southland Corp. Figures are for gasoline refining and supply segment only—includes refining, marketing and transportation operations of Citgo Petroleum Corp. and the Gasoline Supply Division.

	Product Imports b/d		Crude Imports b/d		Net Crude Production b/d			
					Domestic		Foreign	
	1984	1983	1984	1983	1984	1983	1984	1983
Amerada Hess Corp.	—	—	—	—	66,983	74,124	92,280	80,451
American Petrofina	—	—	—	—	18,838	18,197	—	—
Ashland, Inc.	—	—	—	—	2,508	2,677	19,080	14,066
Atlantic Richfield Co.	—	—	—	—	654,800	652,800	58,087	41,900
Chevron Corp.	—	—	—	—	583,000	353,000	1,057,000	1,018,000
CITGO Petroleum Corp. (g)	—	—	—	—	—	—	—	—
Crown Central Petroleum Corp.	—	—	—	16,394	3,249	3,833	—	—
Diamond Shamrock Corp.	—	—	—	—	73,336	31,963	—	21,500
Exxon Corp.	—	—	—	—	778,000	781,000	835,000	746,000
Kerr-McGee Corp.	—	—	—	—	19,500	25,805	23,000	15,491
Marathon Oil Co. (h)	—	—	—	—	163,300	157,300	111,200	89,400
Mobil Oil Corp.	—	5,000	—	127,000	388,000	304,000	381,000	287,000
Murphy Oil Corp.	—	—	—	—	13,734	15,026	40,074	45,660
Phillips Petroleum Corp.	—	—	—	—	136,000	127,000	132,000	127,000
Shell Oil Co.	—	—	—	—	680,000	626,000	173,000	202,000
Standard Oil Co. (Indiana)	—	—	—	—	409,000	403,000	440,000	383,000
Standard Oil Co. (Ohio)	—	—	—	—	634,437	612,002	0	0
Sun Co.	—	—	—	—	159,000	170,700	28,900	28,800
Tenneco	—	—	—	—	89,050	77,634	38,392	37,997
Texaco Inc.	—	—	—	—	698,000	393,000	1,678,000	1,615,000
Union Oil Co. of California	—	—	—	—	152,000	152,900	83,000	73,100

(g) Owned by The Southland Corp. Figures are for gasoline refining and supply segment only—includes refining, marketing and transportation operations of Citgo Petroleum Corp. and the Gasoline Supply Division.

(h) Owned by United States Steel—figures are for oil and gas segment only.

Reports for 1984

Net Income		Net Income % of Gross Sales		Total Assets				Net income as % of average stockholder equity	
% Change				(add 000)		% Change			
1984 vs. 1983	1984 vs. 1979	1984	1983	1984	1983	1984 vs. 1983	1984 vs. 1979	1984	1983
-17.0%	-66.4%	2.0 %	2.4 %	\$6,352,832	\$6,217,086	2.2%	29.7%	6.6%	8.1%
18.4	-33.6	2.1	2.6	1,705,625	1,399,268	21.9	57.9	6.8	9.4
-277.3	-132.7	—	1.2	4,036,941	4,108,000	1.7	29.7	—	—
-63.4	-51.4	2.3	6.2	22,130,000	23,282,000	-4.9	59.9	—	14.9
-3.5	-14.1	5.5	5.6	36,358,000	24,010,000	51.4	100.8	—	—
-31.8	—	0.28	0.79	1,245,895	1,392,278	-10.5	—	—	—
-87.5	—	0.03	0.24	528,692	652,947	-19.0	—	—	—
531.2	39.9	5.4	—	5,396,400	6,024,400	-10.4	124.9	—	—
11.0	28.7	5.7	5.3	63,278,000	62,963,000	0.5	27.9	19.0	17.2
-45.1	-59.4	1.8	3.4	3,771,000	3,808,934	0.9	57.2	3.7	7.0
11.9	—	12.5	12.2	9,949,000	9,332,000	6.6	—	—	—
-15.6	-36.8	2.1	2.7	41,851,000	35,072,000	19.3	52.2	9.3	10.8
-24.5	-7.1	4.2	5.2	2,685,068	2,792,142	-3.8	43.0	9.5	13.1
12.3	-9.1	5.1	4.7	16,965,000	13,094,000	29.6	99.2	12.2	11.7
8.5	57.4	8.4	7.9	23,729,000	22,169,000	7.0	47.1	14.1	14.3
16.9	44.9	7.5	6.8	25,734,000	25,805,000	0.3	50.1	17.4	15.7
-1.6	25.4	12.1	12.5	17,487,000	16,362,000	6.9	69.8	—	—
18.7	-23.1	3.4	2.9	12,786,000	12,486,000	2.5	71.4	10.2	8.7
-11.8	10.5	4.2	4.9	18,205,000	17,994,000	1.2	56.5	—	—
-75.2	-82.6	0.6	3.1	37,744,000	27,199,000	38.7	64.1	7.3	8.6
11.9	39.9	6.1	5.9	10,202,800	9,228,000	10.6	69.7	12.3	12.6

(d) Net income was approximately 126,000,000 before 4th quarter write-offs.

(e) Owned by United States Steel—figures are for oil and gas segment only.

(f) Net income was \$1,071,000,000 before \$765,000,000 assets/reserves write-down.

Refinery Crude Runs b/d				Total domestic production as % of total domestic runs		Domestic refined petroleum product sales b/d	
Domestic		Foreign					
1984	1983	1984	1983	1984	1983	1984	1983
368,000	341,000	—	—	18.2%	21.7%	440,000	462,000
112,880	105,310	—	—	16.7	17.3	142,449	136,485
301,813	285,029	—	—	0.8	0.94	374,308	358,900
740,700	697,000	—	0	88.4	93.7	805,100	729,500
1,319,000	845,000	717,000	588,000	44.2	41.8	1,467,000	932,000
—	—	—	—	—	—	—	—
—	82,992	—	11,576	—	4.62	—	113,000
120,000	117,000	—	—	61.1	27.3	143,059	131,062
1,021,000	958,000	2,199,000	2,308,000	76.1	81.5	1,149,000	1,146,000
116,045	119,135	—	—	16.8	21.7	163,732	163,508
—	374,254	—	45,346	—	42.0	466,800	431,146
636,000	618,000	984,000	976,000	61.0	49.2	708,000	699,000
84,204	90,344	13,233	19,893	16.3	16.6	92,071	95,082
288,000	260,000	—	—	47.2	48.8	507,000	505,000
897,000	874,000	0	0	75.8	71.6	903,000	846,000
897,000	933,000	—	—	45.6	43.1	860,000	860,000
405,700	393,700	—	—	100	100	410,813	404,677
325,900	302,700	136,100	145,800	48.7	56.4	582,000	586,400
92,692	83,654	—	—	96.1	92.8	126,235	129,455
946,000	676,000	2,025,000	1,708,000	41.5	58.1	1,180,000	831,000
351,300	360,300	—	—	43.3	40.2	401,900	386,000

Quarterly and Full-Year Earnings— 1984 vs. 1983

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1984	Full-Year 1983	% Change
Exxon Corp.	\$1,475.0	\$1,350.0	\$1,275.0	\$1,425.0	\$5,525.0	\$4,978.0	11.0%
Mobil Oil Corp.	380.0	366.0	238.0	286.0	1,270.0	1,503.0	(15.5)
Texaco Inc.	321.0	302.0	235.0	(552.0)	306.0	1,233.0	(75.2)
Standard Oil Co. (Indiana)	594.0	524.0	600.0	465.0	2,183.0	1,868.0	16.9
Standard Oil Co. (California)	378.0	380.0	342.0	434.0	1,534.0	1,590.0	(3.5)
Atlantic Richfield Co.	395.1	406.3	(519.0)	285.0	367.0	1,348.0	(63.4)
Shell Oil Co.	326.0	418.0	447.0	580.8	1,772.0	1,633.0	8.5
Gulf Oil Corp. (a)	220.0	—	—	—	—	—	—
Tenneco Inc.	155.0	220.0	126.0	130.0	631.0	716.0	(11.9)
Standard Oil Co. (Ohio)	381.0	458.0	359.0	290.0	1,488.0	1,512.0	(1.6)
Phillips Petroleum Co.	193.0	231.0	217.0	169.0	810.0	721.0	12.3
Sun Co.	143.0	137.0	122.0	136.0	538.0	453.0	18.8
Getty Oil Co. (b)	—	—	—	—	—	—	—
Union Oil Co. of California	180.1	185.7	181.2	153.4	700.4	625.9	11.9
Amerada-Hess Corp.	88.4	45.5	40.6	(4.9)	170.5	205.3	(17.0)
Ashland, Inc. (c)	5.0	36.2	(240.9)	25.9	(172.5)	102.8	—
Kerr-McGee Corp.	40.3	68.0	21.6	(35.0)	65.0	118.0	(44.9)
Diamond-Shamrock Corp.	59.5	64.3	61.6	56.8	242.2	(56.2)	—
Murphy Oil Corp.	26.3	23.6	25.3	20.9	96.1	127.4	(24.6)
American Petrofina Co.	10.3	15.7	1.8	17.3	45.1	55.3	(18.4)
Southland Corp. (d)	41.2	58.5	59.9	30.7	160.3	131.8	21.6

(a) Gulf Oil was purchased by Chevron in the spring of 1984 and its earnings were not published separately.

(b) Getty was purchased by Texaco in early 1984 and its earnings were rolled into Texaco's report.

(c) Ashland's fiscal ends 9/30 and the full-years of 1984 and 1983 reflect this aspect.

(d) Southland, while not an oil company per se, is nevertheless the leading independent retailer of gasoline.

How They Fared in 1983 vs. 1982

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1983	Full-Year 1982	% Change
Exxon Corp.	\$1,060.0	\$1,075.0	\$1,225.0	\$1,630.0	\$4,990.0	\$4,190.0	19.1%
Mobil Oil Corp.	250.0	402.0	404.0	445.0	1,501.0	1,213.0	23.7
Texaco Inc.	319.0	327.0	331.0	256.0	1,233.0	1,281.0	(3.7)
Standard Oil Co. (Indiana)	399.0	426.0	584.0	459.0	1,868.0	1,826.0	2.3
Standard Oil Co. (California)	310.0	368.0	509.0	403.0	1,590.0	1,380.0	15.2
Atlantic Richfield Co.	310.4	393.4	405.1	419.0	1,547.0	1,676.1	7.6
Shell Oil Co.	246.0	390.0	449.0	549.0	1,633.0	1,605.0	1.7
Gulf Oil Corp.	182.0	223.0	276.0	297.0	978.0	900.0	8.7
Tenneco Inc.	111.0	205.0	159.0	241.0	716.0	819.0	(12.6)
Standard Oil Co. (Ohio)	277.0	476.0	435.0	324.0	1,512.0	1,879.0	(19.5)
Phillips Petroleum Co.	129.0	169.0	176.0	247.0	721.0	646.0	11.6
Sun Co.	90.0	135.0	167.0	61.0	453.0	537.0	(15.6)
Getty Oil Co.	157.8	(86.1)	183.7	238.9	494.3	691.6	(28.5)
Union Oil Co. of California	128.3	139.4	180.2	178.0	626.0	804.0	(22.1)
Amerada-Hess Corp.	5.0	68.2	75.1	57.0	205.3	168.7	21.7
Ashland, Inc.	29.1	(14.5)	37.1	51.1	102.8	180.9	(43.1)
Kerr-McGee Corp.	23.7	37.8	39.7	17.1	118.4	209.8	(43.5)
Diamond-Shamrock Corp.	4.6	29.5	39.7	(130.0)	(56.2)	185.1	—
Murphy Oil Corp.	27.9	40.4	39.8	24.0	132.0	158.0	(16.5)
American Petrofina Co.	0.3	8.6	23.0	55.3	23.4	14.8	58.1
Crown Central Petroleum Corp.	(10.5)	3.9	3.6	7.0	4.0	7.0	(42.6)
Southland Corp.	7.7	34.0	60.1	36.8	138.6	101.2	40.0

FLEET CONTROL & SECURITY



FCSI
CARD-ACTIVATED
REFUELING AT
THE WOODLANDS,
WOODLANDS, TX
CONTROLS OVER
400 FLEET VEHICLES.

U.L. LISTED FCC REGISTERED

FCSI SYSTEMS

We have the right experience and the right equipment to solve your product-loss and record-keeping problems.

We give you total fleet control on several programmable levels with the CS6000 system. Its advanced card-reader technology designed specifically for fuel dispensing systems—mechanical or electronic.

Total Control Management. From product inventory control to driver refueling to odometer records, our card-activated CS6000 systems can help you keep track of all fuel, all drivers and all vehicles, 24 hours a day. Fuel consumption, vehicle performance, maintenance, deliveries and cost accounting become simple matters of electronic record.

Full Operational Security. Our CS6000 systems can help you stop unauthorized refueling, record tampering and vehicle overuse—to help protect your operating margin.



Cut operating costs and fuel losses with the flexible electronic control and security of a CS6000 card-activated system. Available for credit, debit or proprietary card control. Fully adaptable to existing equipment.

Contact us today for details and a personal review of your fleet management set-up, at no obligation.



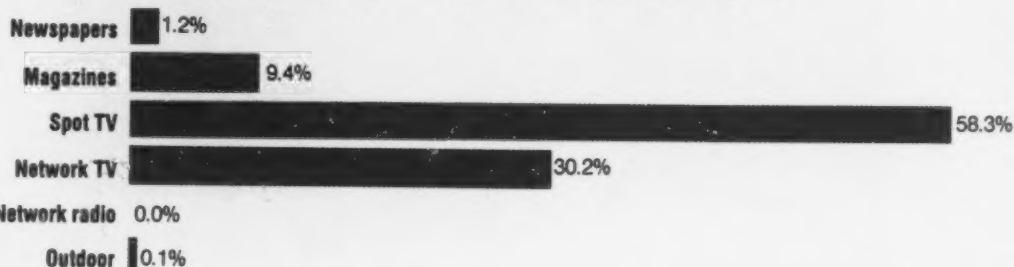
FINANCIAL CARD SYSTEMS, INC.
600 Century Plaza Dr., Suite 140 Houston, Texas 77073
Telephone: 713/821-9865

FCSI—a subsidiary of Tokheim Corporation.



How Oil Spends Its Ad Money

How Some Companies Divide Their Media Expenditures



Source: Various groups. See footnotes of table below for specifics.

Spot TV Spending

Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change	Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change
Exxon	\$15,371	\$16,237	+ 6%	Ashland	3,037	3,102	+ 2%
Chevron (incl. Gulf)	10,110	12,433	+ 23	Quaker State	2,624	2,844	+ 8
Standard Oil (Ind.)	11,977	11,546	- 4	Sun	3,300	2,794	- 15
Shell	7,386	10,989	+ 49	Burmah Oil	2,241	2,768	+ 24
Mobil	7,384	9,571	+ 30	Wilco (Kendall & Amalie)	487	1,373	+182
Texaco (incl. Getty)	8,707	8,824	+ 1	Amerada Hess	—	936	—
Atlantic Richfield	1,965	4,736	+141	Conoco	225	860	+282
Union Oil Co. of Calif.	6,072	4,671	- 23	Am. Petrofina	1,008	795	- 21
Pennzoil	2,849	4,556	+ 60	Standard Oil (Ohio)	663	615	- 7
Phillips	802	3,669	+357	Marathon Oil	388	447	+ 15

Source: Television Bureau of Advertising from Broadcast Advertisers Reports (BAR) in the top 75 markets, April 1985.

Network TV Spending

Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change	Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change
Atlantic Richfield	\$ 141	\$10,020	+7006%	General Motors (Goodwrench Motor Oil)	—	2,525	—%
Phillips	11,225	7,979	- 29	Unocal	1,005	1,909	+ 90
Quaker State	4,587	7,270	+ 58	Shell	1,697	1,643	- 3
Sun	1,933	6,491	+ 236	Wilco (Kendall)	1,045	860	- 18
Texaco (inc. Getty)	5,303	5,870	+ 11	Chevron (inc. Gulf)	999	369	- 63
Burmah (Castrol)	3,819	5,348	+ 40	Conoco	631	342	- 46
Pennzoil	5,877	5,006	- 15				

Source: Television Bureau of Advertising from Broadcast Advertisers Reports (BAR) in the top 75 markets, April 1985.

How Some Oil Companies Split Their Budgets

	Mobil		Exxon		Arco		Phillips	
	1984	1983	1984	1983	1984	1983	1984	1983
Newspaper								
Supplements	\$ 1,128	\$ 1,306	\$ 53	—	—	—	NA	\$ 6
Magazines (a)	3,799	3,924	4,804	3,321	534	339	NA	1,450
Spot TV	26,377	20,825	16,239	16,210	10,438	7,114	3,669	802
Network TV	11,321	7,170	—	1,110	10,020	82	7,979	11,224
Network Radio	—	—	—	580	—	—	NA	892
Outdoor	44	53	839	350	1	4	NA	8
Totals	\$42,669	\$33,278	\$21,935	\$21,571	\$20,993	\$7,539	\$11,648	\$14,382

(a) Includes general, business and farm publications.
NA = Not available.

Sources: Leading National Advertisers, Publishers' Information Bureau, Broadcaster-Advertiser Reports Inc., Television Bureau of Advertising, and Institute of Outdoor Advertising.

ADD'S LATEST, REMOTE COMPUTER LINK



Now you don't need a display terminal or printer to get information out of your computer. ADD has a computer that talks!

The ADD VoxLink™ makes it all possible.

All it takes is a telephone. Any touchtone telephone, and you'll be able to gain access* into your ADD Management System. Without any special, direct telephone line or equipment.

Think of it — now your remote locations can call in daily reports, order supplies, parts or products, even check a customer's credit in the middle of the night, before an emergency delivery, without needing an expensive computer terminal.

The ADD VoxLink is only one of many innovations that Advanced Digital Data brought to the petroleum marketing industry. Among ADD's specialized systems are fuel oil and propane distribution, wholesale and bulk plant management, heating and cooling service management, service station management, warehouse distribution, and financial management.

Advanced Digital Data offers total solutions to business needs. These include the broad range Management Systems for the Petroleum Marketers, and reliable, high-performance computer products from Digital Equipment Corporation, the world's leading manufacturer of interactive computers.

Find out how easy it is to talk to your computer. Send in the coupon below or call us today at 801-584-4026.

**ADD
SYSTEMS**

ADVANCED DIGITAL DATA, INC.

ADVANCED DIGITAL DATA COMPUTER TERMINALS

354 Rt. 906, Flanders, NJ 07836

*Access is only possible after passing some reasonable security restrictions.

© 1984 Advanced Digital Data, Inc.

VoxLink is a registered trademark of Advanced Digital Data, Inc.

Please send me information about the following ADD Management Systems:

- ☐ ACCOUNTS RECEIVABLE
- ☐ HEATING & COOLING SERVICE
- ☐ SERVICE STATION
- ☐ WHOLESALE/BULK PLANT
- ☐ WAREHOUSE DISTRIBUTION
- ☐ FUEL DELIVERY ☐ FINANCIAL

NAME _____

COMPANY _____

TYPE OF BUSINESS _____

ADDRESS _____

CITY/STATE/ZIP _____

TELEPHONE _____

ADVANCED DIGITAL DATA

Current Automotive Registrations

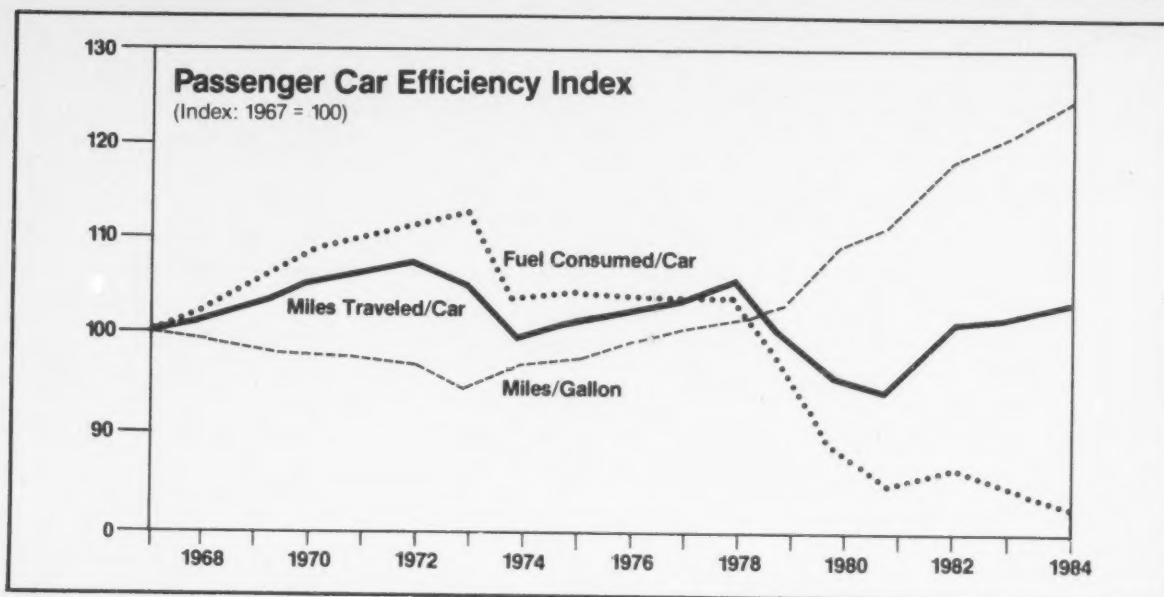
State	Automobiles			Trucks and Buses			All Motor Vehicles			Motorcycles
	Registered 1983	Estimated 1984	% Chng.	Registered 1983	Estimated 1984	% Chng.	Registered 1983	Estimated 1984	% Chng.	Estimated 1984
Alabama	2,271,950	2,317,000	2.0	672,819	693,000	2.9	3,144,780	3,210,000	2.1	76,000
Alaska	216,673	234,000	7.0	131,815	144,000	9.2	350,488	378,000	7.8	11,000
Arizona	1,634,258	1,682,000	2.9	665,211	675,000	3.0	2,289,476	2,357,000	2.9	89,000
Arkansas	941,393	927,000	-1.5	504,078	501,000	-0.6	1,445,471	1,428,000	-1.2	23,000
California	13,935,390	14,730,000	5.7	3,831,369	4,140,000	8.1	17,766,759	18,870,000	6.2	715,000
Colorado	1,939,178	2,020,000	4.2	709,690	759,000	6.9	2,648,868	2,779,000	4.9	117,000
Connecticut	2,149,351	2,185,000	1.7	155,751	155,000	-0.5	2,305,102	2,340,000	1.5	80,000
Delaware	342,205	361,000	5.5	84,596	92,000	8.7	426,803	453,000	6.1	11,000
Dist. of Col.	214,299	215,000	0.3	18,426	19,000	3.1	232,725	234,000	0.5	6,000
Florida	7,113,942	7,682,000	8.0	1,694,544	1,866,000	10.1	8,808,485	9,548,000	8.4	247,000
Georgia	3,132,514	3,202,000	2.2	1,075,194	1,096,000	1.9	4,207,708	4,298,000	2.1	107,000
Hawaii	557,879	573,000	2.7	58,536	60,000	2.5	616,415	633,000	2.7	9,000
Idaho	529,018	530,000	0.2	348,302	359,000	3.1	877,320	889,000	1.3	51,000
Illinois	5,929,783	6,002,000	1.2	1,583,335	1,705,000	7.7	7,513,118	7,707,000	2.6	231,000
Indiana	2,852,382	2,850,000	-0.1	999,370	994,000	-0.5	3,851,752	3,844,000	-0.2	136,000
Iowa	1,764,651	1,780,000	0.9	714,467	751,000	5.1	2,479,118	2,531,000	2.1	242,000
Kansas	1,406,358	1,423,000	1.0	639,173	649,000	1.5	2,047,531	2,072,000	1.2	102,000
Kentucky	1,812,875	1,816,000	0.2	807,949	816,000	1.0	2,620,824	2,632,000	0.4	58,000
Louisiana	2,023,957	2,037,000	0.6	852,684	872,000	2.3	2,876,621	2,909,000	1.1	63,000
Maine	561,947	583,000	3.7	203,834	207,000	1.6	765,781	780,000	3.2	50,000
Maryland	2,516,084	2,675,000	6.3	495,025	517,000	4.4	3,011,109	3,192,000	6.0	71,000
Massachusetts	3,374,962	3,401,000	0.8	464,745	467,000	0.5	3,839,707	3,868,000	0.7	116,000
Michigan	5,024,521	5,038,000	0.3	1,270,328	1,291,000	1.6	6,294,849	6,329,000	0.5	229,000
Minnesota	2,407,373	2,448,000	1.7	874,784	915,000	4.6	3,282,157	3,363,000	2.5	171,000
Mississippi	1,189,446	1,192,000	0.2	370,831	373,000	0.6	1,560,277	1,565,000	0.3	29,000
Missouri	2,541,403	2,553,000	0.5	891,639	907,000	1.7	3,433,042	3,460,000	0.8	91,000
Montana	486,294	526,000	8.2	342,442	368,000	7.5	828,737	894,000	7.9	32,000
Nebraska	815,232	828,000	1.6	419,359	427,000	1.8	1,234,591	1,255,000	1.7	47,000
Nevada	527,232	542,000	2.8	203,219	213,000	4.8	730,451	755,000	3.4	22,000
New Hampshire	686,966	712,000	3.6	115,674	118,000	2.0	802,640	830,000	3.4	55,000
New Jersey	4,412,437	4,438,000	0.6	528,237	535,000	1.3	4,940,674	4,973,000	0.7	99,000
New Mexico	798,398	819,000	2.6	438,144	462,000	5.4	1,236,542	1,281,000	3.6	55,000
New York	7,357,044	7,585,000	3.1	1,050,459	1,087,000	3.5	8,416,503	8,672,000	3.0	210,000
North Carolina	3,461,818	3,543,000	2.3	1,141,563	1,147,000	0.5	4,603,381	4,690,000	1.9	116,000
North Dakota	390,331	396,000	1.5	275,360	280,000	1.7	665,691	676,000	1.5	33,000
Ohio	6,429,344	6,520,000	1.4	1,339,001	1,349,000	0.7	7,768,345	7,869,000	1.3	289,000
Oklahoma	1,757,739	1,745,000	-0.7	1,011,319	1,030,000	1.8	2,769,058	2,775,000	0.2	129,000
Oregon	1,476,548	1,486,000	0.6	643,975	667,000	3.6	2,120,523	2,153,000	1.5	85,000
Pennsylvania	5,738,155	5,868,000	2.3	1,105,894	1,110,000	0.4	6,844,049	6,978,000	2.0	229,000
Rhode Island	518,803	524,000	1.0	79,535	81,000	1.8	598,338	605,000	1.1	27,000
South Carolina	1,578,316	1,618,000	4.3	479,479	502,000	4.7	2,057,795	2,148,000	4.4	40,000
South Dakota	380,543	399,000	2.2	238,915	242,000	1.3	629,458	641,000	1.8	40,000
Tennessee	2,904,367	2,999,000	3.3	832,645	850,000	2.7	3,537,012	3,649,000	3.2	79,000
Texas	8,159,008	8,328,000	2.1	3,536,470	3,713,000	5.0	11,895,478	12,041,000	3.0	324,000
Utah	735,930	769,000	4.5	338,354	350,000	3.4	1,074,284	1,119,000	4.2	68,000
Vermont	282,469	298,000	5.5	84,886	88,000	3.7	367,355	386,000	5.1	23,000
Virginia	3,328,903	3,405,000	2.3	565,157	580,000	2.6	3,894,060	3,985,000	2.3	81,000
Washington	2,360,117	2,407,000	2.0	978,216	994,000	1.6	3,338,333	3,401,000	1.9	134,000
West Virginia	906,519	925,000	2.0	388,645	401,000	3.2	1,295,165	1,326,000	2.4	31,000
Wisconsin	2,547,140	2,597,000	2.0	667,022	717,000	7.5	3,214,162	3,314,000	3.1	215,000
Wyoming	290,426	292,000	0.5	211,840	220,000	3.9	502,266	512,000	1.9	24,000
TOTAL	126,727,873	130,053,000	2.6	37,133,296	38,554,000	3.8	163,661,169	168,607,000	2.9	5,618,000

Source: Federal Highway Administration, SH83-2, October 1984.

Estimated Licensed Drivers, By Sex and States, 1983 and 1984

(Add 000)

State	1983 (Actual)				1984 (Estimated)		
	Male	Female	Total	% Male Drivers	Male	Female	Total
Alabama	1,244	1,150	2,394	51.98	1,270	1,174	2,444
Alaska	168	121	289	58.12	164	119	283
Arizona	1,178	1,001	2,179	54.06	1,249	1,062	2,311
Arkansas	852	798	1,650	51.63	884	829	1,713
California	8,810	7,838	16,648	52.92	8,994	8,001	16,995
Colorado	1,162	1,067	2,229	52.15	1,188	1,090	2,278
Connecticut	1,183	1,086	2,250	51.71	1,189	1,111	2,300
Delaware	222	210	432	51.42	225	213	438
Dist. of Col.	203	167	370	54.96	206	168	374
Florida	4,334	4,014	8,347	51.92	4,498	4,166	8,664
Georgia	1,917	1,808	3,725	51.45	1,974	1,862	3,836
Hawaii	318	257	575	55.26	323	261	584
Idaho	339	309	648	52.26	345	316	661
Illinois	3,649	3,336	6,985	52.24	3,683	3,349	7,012
Indiana	1,818	1,732	3,551	51.21	1,822	1,736	3,558
Iowa	958	971	1,929	49.65	949	963	1,912
Kansas	851	830	1,681	50.61	842	822	1,664
Kentucky	1,173	1,019	2,193	53.52	1,193	1,037	2,230
Louisiana	1,462	1,305	2,767	52.84	1,523	1,360	2,883
Maine	396	374	770	51.40	405	383	788
Maryland	1,450	1,350	2,799	51.78	1,477	1,375	2,852
Massachusetts	1,907	1,771	3,678	51.85	1,902	1,766	3,668
Michigan	3,312	3,033	6,345	52.20	3,335	3,053	6,388
Minnesota	1,232	1,141	2,374	51.92	1,247	1,155	2,402
Mississippi	966	837	1,803	53.57	991	859	1,850
Missouri	1,715	1,608	3,323	51.60	1,732	1,624	3,356
Montana	268	221	489	54.82	271	223	494
Nebraska	564	530	1,095	51.55	568	534	1,102
Nevada	359	317	676	53.09	376	333	709
New Hampshire	362	335	697	51.89	371	344	715
New Jersey	2,876	2,583	5,459	52.68	2,985	2,681	5,666
New Mexico	398	367	766	52.00	410	379	789
New York	5,114	4,491	9,606	53.24	5,169	4,540	9,709
North Carolina	2,040	1,926	3,966	51.44	2,080	1,963	4,043
North Dakota	225	207	432	52.06	228	210	438
Ohio	3,839	3,558	7,397	51.90	3,786	3,508	7,294
Oklahoma	1,119	1,055	2,174	51.47	1,152	1,087	2,239
Oregon	1,005	896	1,901	52.83	1,032	919	1,951
Pennsylvania	3,968	3,474	7,443	53.33	4,012	3,511	7,523
Rhode Island	309	294	603	51.23	311	296	607
South Carolina	992	1,016	2,008	49.39	1,012	1,037	2,049
South Dakota	250	232	482	51.82	251	233	484
Tennessee	1,514	1,419	2,933	51.63	1,541	1,443	2,984
Texas	6,021	5,386	11,406	52.78	6,356	5,688	12,044
Utah	460	467	926	49.63	476	484	960
Vermont	190	171	361	52.63	193	175	368
Virginia	2,017	1,887	3,704	54.46	2,069	1,731	3,800
Washington	1,504	1,363	2,867	52.45	1,547	1,403	2,950
West Virginia	795	622	1,417	56.14	790	618	1,408
Wisconsin	1,602	1,484	3,086	51.91	1,622	1,502	3,124
Wyoming	216	178	394	54.77	225	186	411
Total	80,807	73,414	154,221	52.40	82,423	74,882	157,305
Percent Change From Prior Year ..	2.8	2.4	2.6	—	2.0	2.0	2.0



Source: Energy Information Administration, Monthly Energy Review, for 1967 through 1983; NPN estimates and projections for 1984.

Passenger Car Energy Indicators—1967-1984

(1967 = 100)

Year	Passenger Cars Only						Passenger Cars (a)		
	Avg. Fuel Used per Car		Avg. Miles Traveled per Car		Avg. Miles per gal. of Fuel		Number Registered (000)	Gasoline Consumed (000,000 gal.)	Miles Traveled (000,000)
	Gal.	Index	Miles	Index	Miles	Index			
1984 (b)	570	83.3	9,900	103.9	17.36	124.6	135,671	77,332	1,343,143
1983	577	84.4	9,641	101.2	16.70	119.9	132,313	73,390	1,233,846
1982	587	85.8	9,533	100.1	16.25	116.7	129,500	72,848	1,191,623
1981	579	84.6	9,002	94.4	15.54	111.6	129,123	71,718	1,124,843
1980	603	88.2	9,135	95.8	15.15	108.8	127,448	73,375	1,129,887
1979	664	97.1	9,485	99.5	14.29	102.6	125,750	80,233	1,162,528
1978	715	104.5	10,046	105.4	14.06	100.9	121,717	83,775	1,194,287
1977	706	103.2	9,839	103.2	13.94	100.1	118,711	80,677	1,141,166
1976	711	103.9	9,763	102.4	13.72	98.5	115,170	78,847	1,098,147
1975	712	104.1	9,634	101.1	13.53	97.1	111,679	76,457	1,050,472
1974	704	102.9	9,448	99.1	13.43	96.4	109,823	74,217	1,013,068
1973	763	111.5	9,992	104.8	13.10	94.0	106,119	78,011	1,036,455
1972	755	110.4	10,184	106.9	13.49	96.8	100,658	73,463	1,003,498
1971	746	109.1	10,121	106.2	13.57	97.4	96,144	69,514	954,155
1970	735	107.5	9,978	104.7	13.57	97.4	92,095	65,784	900,992
1967	684	100.0	9,531	100.0	13.93	100.0	82,367	55,110	774,203

(a) These totals include motorcycles.

(b) Estimates by NPN based on Federal Highway Administration preliminary data.

Source: Energy Information Administration Monthly Energy Review; Federal Highway Administration, Table SS83-15 (VM-1); American Petroleum Institute Basic Data Book, January 1985.

Mileage and Consumption Data—1983

	Passenger Vehicles					
	Buses			Total Passenger	Trucks and Combinations	All Motor Vehicles
	Cars and Motorcycles	Commercial	School	All Buses		
Fuel consumed (million gal.)	73,390(a)	737	402	1,139	74,530	40,858
Average per vehicle (gal.)	555(b)	6,625	848	1,946	561	1,118
Average miles per gal.	16.81(c)	4.95	7.70	5.92	16.65	10.00
Vehicles registered (thousands)	132,313(d)	111	474	586	132,898	36,548
Average miles traveled	9,325(e)	32,795	6,532	11,521	9,335	11,178
Average miles traveled (millions):						
Main rural roads	289,514	792	801	1,593	291,107	127,009
Local rural roads	187,728	461	1,022	1,483	189,211	93,206
Urban streets	756,604	2,401	1,269	3,670	760,274	188,299
Total travel in 1983	1,233,846(f)	3,648	3,098	6,746	1,240,592	408,514
Total travel in 1982	1,191,623	3,577	3,062	6,639	1,198,262	394,219

(a) Includes 73,150,198,000 for passenger cars and 240,000,000 for motorcycles.

(b) Includes 577 for passenger cars and 43 for motorcycles.

(c) Includes 16.25 mpg for passenger cars and 50.00 mpg for motorcycles.

(d) Includes 126,727,870,000 passenger cars and 5,585,112 motorcycles.

(e) Includes 1,221,846,000 for passenger cars and 12,000,000 for motorcycles.

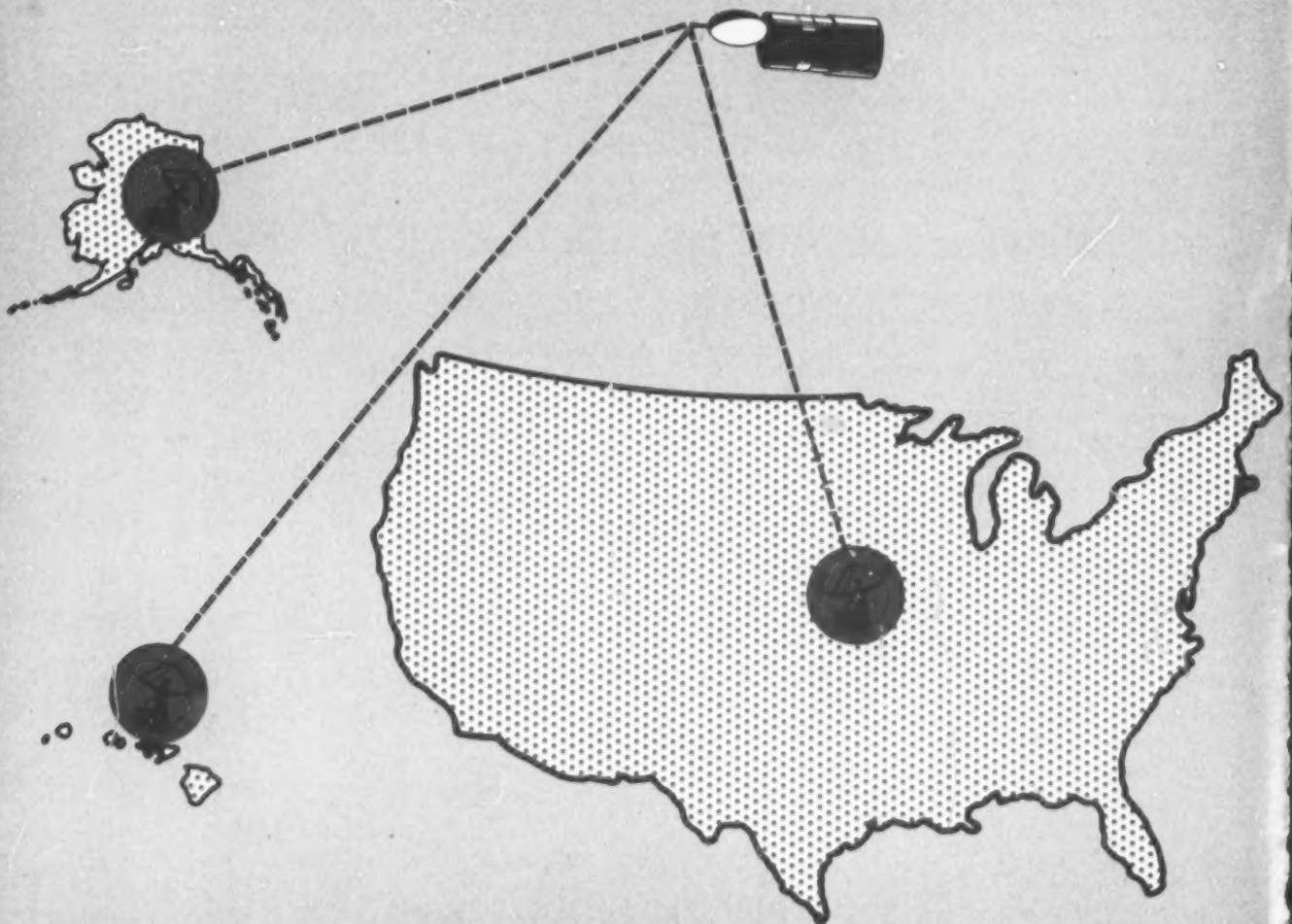
(f) Includes 1,179,000,000,000 for passenger cars and 12,000,000 for motorcycles.

Source: Federal Highway Administration, Table SS83-15 VM-11, October 1984.

1983 Relationships by Population and Drivers

State	Resident Population (1,000)	Licensed Drivers per 1,000 Resident Population	Registered Motor Vehicles per 1,000 Resident Population	Gal. of Fuel per Vehicle	Miles per Gal.	Annual Miles per Vehicle	Vehicle Miles per Licensed Driver
Alabama	3,959	805	794	579	14.52	9,868	12,963
Alaska	479	603	732	797	12.02	9,581	11,630
Arizona	2,963	735	773	691	12.39	8,586	9,001
Arkansas	2,328	709	621	935	12.34	11,542	10,114
California	25,174	661	706	674	15.24	10,281	10,971
Colorado	3,139	710	844	599	15.19	9,102	10,816
Connecticut	3,138	717	735	611	14.65	8,950	9,171
Delaware	606	713	704	813	14.08	11,448	11,309
Dist. of Col.	623	594	374	806	16.52	13,316	8,371
Florida	10,680	782	825	630	14.74	9,284	9,797
Georgia	5,732	850	734	814	14.25	11,807	13,110
Hawaii	1,023	562	603	515	18.49	9,528	10,214
Idaho	989	655	887	560	16.88	9,446	12,786
Illinois	11,486	608	654	665	13.49	8,967	9,645
Indiana	5,479	648	703	777	13.31	10,343	11,219
Iowa	2,905	664	853	650	12.21	7,931	10,193
Kansas	2,425	693	844	687	12.91	8,866	10,796
Kentucky	3,714	890	706	762	13.38	10,195	12,186
Louisiana	4,438	624	848	847	11.32	9,585	9,964
Maine	1,146	672	668	762	13.58	10,348	10,288
Maryland	4,304	650	700	691	14.72	10,168	10,937
Massachusetts	5,767	638	666	633	15.44	9,777	10,205
Michigan	9,069	700	694	537	17.99	9,667	9,592
Minnesota	4,144	573	792	653	14.50	9,464	13,085
Mississippi	2,587	697	603	674	13.06	11,410	9,874
Missouri	4,970	669	691	823	12.94	10,644	10,999
Montana	817	598	1,014	632	13.70	8,665	14,697
Nebraska	1,597	685	773	727	12.84	9,342	10,536
Nevada	891	759	820	751	12.52	9,408	10,165
New Hampshire	959	727	837	534	16.76	8,947	10,303
New Jersey	7,468	731	662	738	14.33	10,569	9,567
New Mexico	1,399	547	884	703	13.43	9,444	15,255
New York	17,667	544	476	673	14.80	9,955	8,722
North Carolina	6,082	652	757	707	13.84	9,784	11,355
North Dakota	680	635	979	626	12.86	8,056	12,422
Ohio	10,746	688	723	670	14.07	9,425	9,897
Oklahoma	3,298	659	840	776	13.76	10,677	13,597
Oregon	2,662	714	797	673	14.41	9,694	10,816
Pennsylvania	11,895	626	575	729	14.49	10,564	9,714
Rhode Island	955	632	627	624	16.10	10,051	9,971
South Carolina	3,284	815	630	856	14.18	12,138	12,441
South Dakota	700	689	899	656	15.31	10,036	13,094
Tennessee	4,685	628	765	765	13.40	10,252	12,382
Texas	15,724	725	744	824	13.69	11,276	11,562
Utah	1,619	572	664	723	14.45	10,445	12,112
Vermont	525	687	700	710	15.92	11,300	11,510
Virginia	5,550	667	702	741	14.66	10,862	11,419
Washington	4,300	667	776	634	17.08	10,827	12,607
West Virginia	1,965	721	659	691	13.07	9,031	8,254
Wisconsin	4,751	649	677	697	15.23	10,611	11,053
Wyoming	514	767	977	634	12.07	10,072	12,639
Total	233,981	659	700	704	14.29	10,064	10,693

THE ELECTRONIC RETAIL SUPPORT SYSTEMS NETWORK

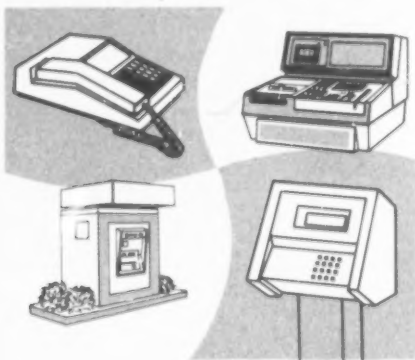


THE NETWORK FOR TODAY
AND FOR THE FUTURE

JCPenney is one of the largest retailers in the world.

Our basic business is the same as yours—selling goods and services to the consumer. Over the past ten years JCPenney has developed a nationwide communications network with over 35,000 on-line terminals supporting our retail management systems.

JCPenney Systems Services, a wholly owned subsidiary, is a full service vendor offering your company access to the JCPenney network and retail systems expertise. This allows you to implement solutions to your business problems immediately—without the customary development time and costs. We now are the largest provider of Data Capture Services to the Petroleum Industry.



The JCPenney network has the ability to interface with many types of equipment: dial-up terminals, electronic cash registers, island card readers — whatever type of equipment you select, JCPenney will accommodate your needs.

The JCPenney offering includes: authorization of proprietary credit cards, bank credit cards or debit cards; data collection; transaction logging; reconciliation; and delivery of data to the designated settlement system or data center. The offering is flexible and modular — allowing you to incorporate additional applications and additional locations if and when you need them. System redundancy, a complete help desk service and a sophisticated technical staff provide the ability for JCPenney Systems Services to deliver a network service of proven reliability.

The basic service consists of a terminal installed at a customer location connected to a computer in a nearby JCPenney store via a leased line or dial-up link. Using a nearby JCPenney store as the network entry

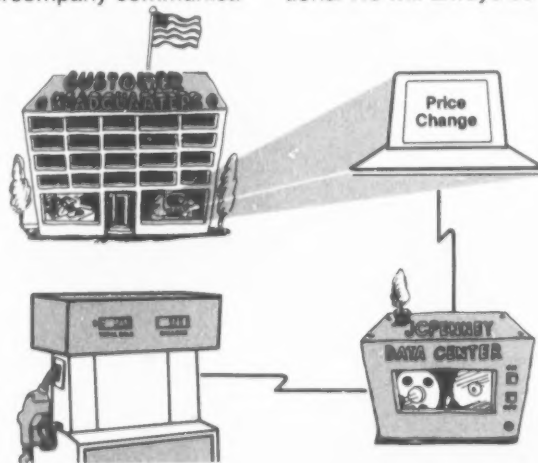


point makes the communication link the shortest and least expensive possible — providing the most cost effective electronic authorization and settlement services for you, the customer.

The benefits of the JCPenney approach to the Petroleum retailer are: reduction in float, reduction in bad debt, reduction in labor costs, improved customer service and convenience, increased market share, more marketing flexibility, improved intercompany communica-

tions — and it prepares you for the electronic payments system of the future.

Systems Services has positioned itself to be able to move rapidly into new technologies and new applications. We will always be ready with



the right network and information processing systems to serve our petroleum customers' needs. Turning today's ideas into tomorrow's

products is JCPenney Systems Services commitment to its present and future customers.

For further information contact:

JCPenney Systems Services, Inc.

1301 Avenue of the Americas • New York, NY 10019 • (212) 957-6211

Brand Names of Gasoline and Motor Oil

Gasoline	Motor Oil	Gasoline	Motor Oil	Gasoline	Motor Oil
Ada Resources		Campbell Oil Co.		Crystal Flash Petroleum Corp.	
Phillips 66 (r,ur,up,d)	Phillips 66	Sunoco	Citgo	Crystal (r,ur)	
American Petrofina		Shell	Sunoco	Crystal Petroleum Co.	
Fina (r,ur,up)	Fina Shield Fina HD Premium Fina Ultra Supreme Fina Turbo Fina 2001	Union 76	Shell	Shell (r,ur,up,d)	
Amoco Oil Co.		Cel Oil Products Corp.		Champlin (r,ur,up,d)	
Amoco (r)	Amoco 100	Cel (r,ur,p,up,d)		Crystal U.S.A. Oil Inc.	
Amoco Lead Free (ur)	Amoco 200	Gas-Up (r,ur,p,up,d)		Crystal (r,ur,p,d)	Saxon
Amoco Premium Lead Free (up)	Amoco 300 Amoco M-V Amoco LDO Amoco Ultimate	Cenex		Dairy Mart Inc.	
Arkansas Valley Petroleum		Cenex (r,ur,up,d)	Econex Cenex Superlube 518	Chevron	Chevron
DX (r,ur,up)		Certified Oil Co.		Gulf	Quaker State
Phillips 66 (r,ur,up)		Certified (r,ur)	Certified Quaker State Valvoline	A-1	Citgo
Fina (r,ur,up)		Charter Marketing Co.		DeBlois Oil Co.	
Ashland Oil Inc.		Charter (r,ur,up)		Texaco (r,ur,up)	Texaco
Ashland (r,ur,up)	SuperAmerica	Old Colony (r,ur,up)		Sunoco (r,ur,up)	Sunoco
SuperAmerica	Valvoline	A-1 (r,ur,up)		Desert Oil Co.	
(r,ur,up,sp,usp,d)		Chevron Corp.		Chevron	
Payless (r,ur,up,sp,usp,d)		Chevron Regular (r)	Chevron Delo 100	Diamond Shamrock Refining & Marketing Co.	
Hi-Fy (r,ur,up,sp,usp,d)		Chevron Unleaded (ur)	Chevron Delo 200	Trail Master (r)	Liberty
Bi-Lo (r,ur,up,sp,usp,d)		Chevron Supreme	Chevron RPM Delo	Cloud Master (ur)	Genuine
Save More		Unleaded (up)	Motor Oil	Premium (up)	LPG-NG
(r,ur,up,sp,usp,d)		Chevron Unleaded	Chevron Special	Power Master (d)	Triple Action
SoLo (r,ur,up,sp,usp,d)		w/Ethanol (o)	Chevron Delo 300		Triple Action S-3
SoLo (r,ur,up,sp,usp,d)		Calco Regular (r)	Chevron Delo 400		Equa Flow
Red Head (r,ur,up,sp,usp,d)		Calco Unleaded (ur)	Chevron Custom	Dickey Inc.	
Atlantic Richfield Co.		Calco Premium Unleaded	Chevron Delo 300 15W-40	Conoco	
ARCO (r)	ARCO	(up)		Texaco	
ARCO Clear	ARCO Fleet HD	Calco Unleaded w/Ethanol		Drake's Refining Stations	
Unleaded (ur)	ARCO XHD	(o)		Drake's	Kendall
ARCO Unleaded	ARCO Fleet S3 Plus	Circle K Corp.		East Coast Oil Corp.	
Supreme (up)	ARCO Supreme	Aero K (r,ur,up)		East Coast (r,ur,up,d)	
ARCO Lowlead (r—Chicago only)	ARCO GT	Citgo Petroleum Corp.		Englefield Oil Co.	
Bagwell Oil Co.		Citgo Regular (r)	Citgo Non-detergent Motor	Duke (r,ur,up)	Duke
Union 76 (r,ur,up,d)	Union 76	Citgo Unleaded (ur)	Oils	Gulf (r,ur,up)	Gulf
	Wolf's Head	Citgo Unleaded Plus 2	Citgo C-300 Detergent	Marathon (r,ur,up)	Marathon
E.M. Bailey Distributing Co.		(up)	Motor Oils	Mobil (r,ur,up)	Mobil
Chevron (r,ur,up,d)	Chevron	Citgo Super Unleaded	Citgo All Season Motor Oils	Phillips 66 (r,ur,up,d)	
Petro (r,ur,sp,d)	Quaker State	(usp)	Citgo C-500 Motor Oils	Exxon Co., U.S.A.	
Beacon Oil Co.			Citgo C-500 PLUS Motor	Exxon (r)	Oilx
Beacon (r,ur,p,up,d)	Sequoia	Coast Oil Co.		Exxon Unleaded (ur)	Exxon Plus
Ultra (r,ur,p,d)	Beacon	Texaco (r,ur,up,d)	Mortube	Exxon Extra (up)	Exxon Extra
Gas-N-Go (r,ur,p,d)		Arco (r,ur,up,d)	Coast	Alert (r,ur,up)	Uniflo
Best Oil Co.		Rotten Robbie (r,ur,p,up,d)		FCX, Inc.	
Gulf		Coen Oil Co.		FCX (r,ur,up,d)	Unico
Mobil		Amoco		Unico (r,ur,up,d)	
Amoco		Mobil		Flying J Inc.	
Bray Terminals Inc.		Lawsons		Flying J (r,ur,up,d)	Flying J
Citgo (r,ur,up)	Citgo	Colonial Oil Industries		Husky (r,ur,up,d)	
Gas Up Shoppe	Arco	Eagle (r)		Fortmeyer's Inc.	
(r,ur,up,d,o)		Colonial No-Lead (ur)		Pennzoil	Citgo
Brennan Petroleum Co.		Colonial No-Lead (up)		Citgo	Pennzoil
Brenco (r,ur,up,d)		Colonial Diesel (d)			Amalie
Browning Oil Co.		Comet Oil Co.			Arco
Shell (r,ur,up)	Shell	Comet		Foster Oil Co.	
Rally (r,ur,up)		Cook & Cooley Inc.		Union 76 (r,ur,d)	Pennzoil
California Target Enterprises Inc.		Texaco (r,ur,up)			Union 76
Fast Save (r,ur,p,up,d)		Consumers Oil Corp.			National
Q Brand (r,ur,p,up,d)		Mobil	Mobil	Franko Oil Co.	
Texaco (r,ur,up)		Chevron		Franko (r,ur,p,sp)	
Buy-Rite (r,ur,p,d)		Crown Central Petroleum Corp.		GAS-N-Go Inc.	
		Crown (r)	All Season HD	Gas-N-Go (r,ur,up)	
		Lead-Free (ur)	Premium HD		
		Lead-Free Xtra (up)	Quality		
		Diesel (d)			

Gasoline	Motor Oil	Gasoline	Motor Oil	Gasoline	Motor Oil
Gasco Gasoline Inc.		Independent Stations Co.		Marathon Petroleum Co.	
Gasco (r,r,usp,o)	Economy Gasco Premium Gasco All Season	Arco (r,r,p) Exxon (r,r,p)	Arco Union 76	MILE-maker Regular (r) MILE-maker Lead-Free (ur) SUPER-M Lead-Free (up)	Multipower-3 Straight Weight V.E.P. Heavy Duty Motor Oil Thoro Lube SC-CC Endurance Oil Thoro Lube 20W-40 Multipower-3 15W-40 Motor Oil All-Season 10W-30 Motor Oil Superior All-Season 10W-40 Motor Oil 577 Maraflood Super H High Performance All- Season 20W-50
Gem Petroleum		Jacobus Co.		Martin Oil Marketing Ltd.	
Shop & Go (r,r,sp,d) Gem (r,r,sp,d)	Shop & Go Citgo Quaker State	Citgo Union 76		Martin (r,r,up,usp,d)	Martin Oil Martin HD Martin 10-30 Martin 10-40
Golden Gate Petroleum Co.		J&L Oil Inc.		Merchants Oil	
Bapco (r,r,up,d)	Holdener Lubricants	J&L (r,r,p,d)	J&L	Phillips 66	Phillips 66 Pennzoil Shell
Gresham Petroleum Co.		Johnson Products Inc.		Merritt Truax Inc.	
Amoco (r,r,up,d)	Amoco	Citgo (r,r,up) Getty (r,r,up) Texaco (r,r,up) Mobil (r,r,up) Top Gas (r,r,up)	Citgo Havoline Getty	Texaco (r,r,usp,d) Arco (r,r,usp,d) Shell (r,r,usp) Chevron (r,r,usp) Pacific Pride (r,r,usp,d)	
Gull Industries Inc.		J.S.&J. Service Inc.		Mid-Missouri Oil Co.	
Gull (r,r,up)		Jimmy's (r,r,up,d) Texaco (r,r,up,d)		Shell (r,r,up)	Shell
Guttman Oil Co.		Kalbab Petroleum Co.		Milder Oil Co. Inc.	
Texaco Mobil Union 76 Citgo		Whiting Hy-Grade Rev		Texaco	Shield Cato-Mystik Texaco
Handy Pantry Food Stores (Acme Retail Inc.)		Kelley-Williamson Co.		Miller Enterprises Inc. (Handy Way Food Stores)	
Shell Amoco Citgo Texaco Cavalier World		Mobil (r,r,p,d) Mobil Kendall		Union 76 (r,r,p,d) Handy Way (r,r,p,up,d)	Union 76 Quaker State
Hawaiian Independent Refinery Inc.		Kerr-McGee Refining Corp.		Miller Oil Co. (Va.)	
Gas Express (r,r,p,up)		KM Regular (r) KM Unleaded Regular (ur) KM Unleaded Premium (up)	ValuLube Blue Max "All Fleet" Heavy Duty Blue Velvet FEO	Amoco Exxon Phillips 66	
Highland Petroleum Inc.		Key Energy Enterprises Inc.		Mobil Oil Corp.	
Gas Pit (r,r) 7-11 (r,r)		Union 76 (r,r,p,up,usp,d) Shell (r,r,p,up,usp,d)	Shell Quaker State Union 76	Mobil Regular (r) Mobil Unleaded (ur) Mobil Super Unleaded (up)	Mobil Regular Mobil Heavy Duty Mobil Super 10W-30 Mobil Super 10W-40 Mobil Super 20W-50 Mobil Super 5W-30 Mobil 1
Angus I. Hines Inc.		Kickapoo Oil Co.		Murphy Oil USA Inc.	
Shell (r,r,up,d) Texaco (r,r,up,d) Sentry (r,r,up,d) Serco (r,r,up,d)	Shell Texaco	Kickapoo (r,r,p,up,d)	Kickapoo Pennzoil	Spur (r,r,up,d)	
Hinkle Enterprises Inc.		Kimber Petroleum Corp.		Musket Corp.	
Chevron (r,r,up,d)	Chevron	Amoco Citgo Getty	Amoco Citgo Getty	Love's (r,r,usp,d)	Double Eagle Recond. 30W Sup-R-Lub 30W Sup-R-Lub 20W Pennzoil 20W Pennzoil 30W Quaker State Red 30W
Barney Holland Oil Co.		Kimbrow Oil Co.		KEY: Gasoline (r) Regular (ur) Unleaded regular (p) Premium (up) Unleaded premium (sp) Super Premium (usp) Unleaded super premium (o) Other (d) Diesel	
Texaco (r,r,p,d)	Cook's Shell RPM Delco Havoline Pennzoil Quaker State	Amoco (r,r,up,d)	Amoco Quaker State		
Holland Oil Co.		Kingston Oil Supply Corp.			
Holland Oil (r,r,up,d)	Valvoline Citgo Mobil Shell	Chevron (r,r,up) Mobil (r,r,up) Exxon (d)	Chevron Mobil		
Horkey Oil Co. Inc.		Kittle Petroleum Inc.		Land O' Lakes Inc.	
Shell (r,r,p,d)	Shell	Phillips 66 Texaco		Land O' Lakes (r,r,d)	Supreme 212 Golden D
Huck's Convenience Stores		Kwik Shop Inc.		Lank-Como Oil Co.	
Huck's (r,r,up,d)	Huck's	Kwik Power (r,r,up,d)	National Ram-A-Lube Pennzoil	Phillips 66 Citgo	Phillips 66 Citgo
Hughes Oil Co.		Land O' Lakes Inc.		Lyden Oil Co.	
Mobil (r,r,up) Phillips 66 (r,r,up)	Mobil Phillips 66			Amoco (r,r,usp,d) Citgo (r,r,up) Schio (r,r,up,d)	Amoco Valvoline Quaker State Sun Industrial Boron Industrial
Hull Oil Co.		Lank-Como Oil Co.		MAPCO Petroleum Inc.	
Phillips 66 (r,r,up,d) Hull (r,r,up,d)	Phillips 66			Delta (r,r,p,d)	Delta Non-Detergent Delta HD Delta 10W-40
Hunt Oil Co.		MAPCO Petroleum Inc.			
Parade (r,r,up,d)					
Huntley Jiffy Inc.					
Shell Phillips 66 Mobil Fina	Jiffy Phillips 66 Shell Quaker State				

Gasoline	Motor Oil	Gasoline	Motor Oil	Gasoline	Motor Oil
National Convenience Stores Stop-N-Go		Remote Services Inc./Conna Corp. Convenient (r,ur,up,d)		Spartan Petroleum Co. Inc. Chevron (r,ur,sp) Chevron ZeroLine	
National Oil Co. Natco (r) Natco 30 Natco Plus (ur) Natco 10W-30 Natco Super (p) Natco 10W-40		River Oil Co. Phillips 66 Phillips 66 Kerr-McGee Kerr-McGee		The Spencer Companies Amoco (r,ur,up,d) Amoco Citgo (r,ur,up,d) Citgo Quaker State Texaco Chevron Shell	
National Oil & Gas Inc. Phillips 66 (r,ur,d) Phillips 66 Citgo (up) Marathon Gladioux (d) Kendall Marathon (r,ur,up) Shell Mobil		Robinson Oil Co. Inc. Rotten Robbie (r,ur,up,d)		SSG Corporation Auto-Stop (r,ur)	
Newell Oil Co. Inc. Good Gulf (r) Gulf Gulf Crest (ur) Gulf Gulf Super Unleaded (up) Gulf Gulf Diesellect (d)		Ross Resources Inc. APCO		The Standard Oil Company (Ohio) Octron (r) HQD-30 Catron (ur) Premax 10W30 Super Catron (up) Boron 10W30 Diesel Supreme (d) QVO 10W40 BP (r,ur,up) Nitrex Turbo D 10W30 William Penn (r,ur,up) Nitrex MPG 5W40 Gas & Go (r,ur,up) Gibbs (r,ur,up) Soot (r,ur,up)	
Noco Energy Corp. Noco (r,ur,up,d) Noco Gulf Mobil		Ryan-DeWitt Corp. Chevron (r,ur,up) Keystone (r,ur)		Steuart Petroleum Co. Steuart (r,ur,p,d) Pennzoi	
Pacific Northern Oil Co. Shell (r,ur,up) Panoco (r,ur,up)		Sahara Oil Co. Inc. Texaco		Sun Refining & Marketing Co. Regular (r,ur) Diamond Plus (up) Sun Lube Super Sunoco Ultra (usp) Dynalube Economy (d) Special MPG Plus	
Curtis Parker Oil Co. Inc. Amoco (r,ur,up) Amoco		Save-X USA Inc. Save-X (r,ur,up,d) Serv-N-Save (r,ur,up,d)		Sunny Service Stations Inc. Sunny (r,ur,up,d) Arco Chevron Quaker State Pennzoi	
Parker Oil Co. Inc. Union 76 Union 76 Exxon Exxon Shell Shell Citgo Citgo Petrol Texaco Phillips 66		Self Service Oil Co. U Pump (r,ur,up,d) Pennzoi Sprint (r,ur,up,d) Quaker State Citgo		TCR Inc. TCR (r,ur,up,d) TCR	
Peavey Oil Co. Texaco (r,ur,up,d) Texaco Chevron Pennzoi Valvoline		Shay Oil Co. Inc. Exxon Exxon		Tenneco Oil Co. Tenneco (r,ur,up) Shurilube Direct (r,ur,up) Tenneco Four Seasons Trust (r,ur,up) Tenneco Extra Heavy Duty Motor Oil Tenneco Special Detergent Tenneco Premium H.D. Motor Oil Tenneco Super H.D. Diesel Motor Oil	
Pennzoi Products Co. Pennzoi Pennzoi Fleetwing		Shell Oil Company SU-2000 (usp) Shell Motor Oil RU-2000 (ur) Shell X-100 Shell Regular (r) Shell Fire & Ice		Texaco Inc. Texaco Regular (r) Havoline Premium Texaco Super (p) Havoline Supreme Texaco Super Regular Havoline High w/Ethanol (p) Performance Texaco Unleaded (ur) Texaco Premium Unleaded w/Ethanol (up) Texaco Super Unleaded (up) Texaco Super Unleaded w/Ethanol (up)	
Pester Corp. Derby Derby Quaker State Pennzoi		Shores Oil Co. Union 76		Texas City Refining Inc. TCR (r,ur,up,d)	
Pettway Oil Co. Amoco (r,ur,up) Amolube Cash & Carry LDO Ultimate		Shotmeyer Bros. Petroleum Corp. Mobil Mobil		Texas Star Oil Co. Texas Star (r,ur,sp,d) Superior Fleet	
Petroleum Marketers Inc. Shell (r,ur,up) Citgo Exxon (r,ur,up) Exxon Citgo (r,ur,up) Shell		Shotmeyer Oil Corp. U-Save Mogas		Thornhill Oil Co. Amoco Amolube Amoco M-V	
Phillips Petroleum Co. Phillips 66 (r,ur,up,usp) Unique MM Motor Oil Trop-Artic		The SICO Company Amoco (r,ur,up) Citgo Arco (r,ur,up) Arco Texaco (r,ur,up) Texaco Valvoline Amoco Quaker State		Tooley Oil Co. Shell (r,ur,up) Tooley's (r,ur,sp,d)	
Pilot Oil Corp. Pilot (r,ur,up,d) Pilot Economy Motor Oil Pilot Premium Motor Oil		Simon Oil Co. Inc. Sunoco (r,ur,up) Mobil (r,ur,up)		Total Petroleum Inc. Total (r,ur,up,usp,d) Total Duralube Vickers (r,ur,up,usp,d) Total Super HD APCO (r,ur,up,usp,d) Total Superlube Best (r,ur,up,usp,d) Total 500	
Pride Oil Co. Inc. (Tenn.) Tenneco (r,ur,up) Kendall		Smith-Shafer Oil Co. SS (r,ur,up,d) SS Quaker State			
Publix Oil Co. Inc. Publix (r,ur,up,d) Phillips 66 (r,ur,up,d) Shell (r,ur,up)		SMO Inc. Texaco Prize Penn BP BP Arco Arco Havoline Kendall Quaker State			
QuikTrip Corp. QuikTrip (r,ur,up,d) Redline		SOS Oil Corp. Gulf Gulf Amoco Amoco SOS Kendall			
		Southern Oil Co. Inc. Phillips 66 Phillips 66 Quaker State Pennzoi			

Gasoline	Motor Oil	Gasoline	Motor Oil	Gasoline	Motor Oil
Town Pump Inc. & Affiliates Town Pump		Western Marketing Inc. Conoco (r,ur,p,d) Conoco		York Oil Co. Citgo (r,ur,p) Easy Go (r,ur,p)	
Transit Oil Co. Mobil (r,ur,p,d) Shell (r,ur,p) Transit (r,ur,p,d)		Wickland Oil Co. Regal (r,ur,p)		Zards Bros. Dairy Inc. Amoco Ram-McGee Zarta	
Trenton Oil Co. Amoco (r,ur,p,d) Amoco		A.T. Williams Oil Co. Wilco (r,ur,p) Wilco		Zephyr Inc. Zephyr (r,ur,p) Conoco Texaco Mobil Pennzoil	
Triton Inc. Phillips 66 (r,ur,p,d) Sav-A-Ton (r) Happy Stores (r,ur,p,d)		J.H. Williams Oil Company Union 76 (r,ur,p,usp) Union			
Thrifty Oil Co. Thrifty Economy Go-Lo					
Ultramar Petroleum Inc. Ultramar (r,ur,p,d) Ultramar Mobil (r,ur,p) Getty (r,ur,p) Augsbury (r,ur,p)					
Union Oil Co. of California 76 (r,ur,p,usp,d) Union Heavy Duty Union Premium Union Guardol Union Super 10W-30 Union Super 10W-40 Union 20W-50 High Performance					
United Refining Co. Kwik Fill (r,ur,p,d) Keystone (r,ur,p,d)					
Vicksburg Refining Inc. Citgo Citgo					
Wake Up Oil Co. Wake Up (r,ur,p)					
Warelubco Inc. Wareco (r,ur,sp) Wareco Premium Wareco Plus Wareco Super All Season					
Webaco Oil Co. Citgo (r,ur,p) Ashland (r,ur,p) Citgo					
Webb Oil Company Rabot					
Webster Oil Co. Phillips 66 Phillips Pennzoil Quaker State Havoline Kendall Castrol					
Weeson Inc. Texaco (r,ur,p,d) Mobil (r,ur,p,d) Arco (r,ur,p,d)					

KEY:

- Gasoline
 (r) Regular
 (ur) Unleaded regular
 (p) Premium
 (up) Unleaded premium
 (sp) Super Premium
 (usp) Unleaded super premium
 (o) Other
 (d) Diesel





NEW! TLS-250 TANK LEVEL SENSOR...

Measures fuel inventories accurately and automatically... tests tanks on demand!

Tighten Inventory Control

TLS-250 tightens inventory control by continuously monitoring the fuel in your underground tanks. It provides detailed reports on fuel volume and height, temperature, water level, and the time and date at the touch of a button. Plus it helps speed shift changes, reduces inventory errors, spots losses from theft, leaks and meter miscalibration, and assists in implementing sound inventory practices.

Loss Detection = Environmental Protection

Unexplained inventory losses, even small ones, may be leaks that can cause severe environmental damage. Inventory control records from TLS are the first step in spotting them. Then you can switch immediately to "Leak Detect" for a closer look. If the test confirms your suspicions, you can take action fast!

Report and Alarm Features Add Station Security

TLS-250 features automatic reports and alarms that add extra security to your station. Reports to confirm bulk delivery amounts automatically. A high-level alarm to warn of overfill during bulk deliveries. And programmable low-fuel inventory and high water limit alarms. Plus, a sudden-loss alarm to detect rapid inventory changes caused by theft or a major tank failure during closed hours.

Flexible System Design

TLS systems feature an electronic sensing probe permanently installed in each tank, and up to eight tanks (single or manifolded) can be monitored by one system. Plus, TLS-250 can be field-programmed to match tank sizes, designs and fuel types.

In addition, a security key lock lets you select "normal" operation, "setup" to enter or change system and tank parameters, or "diagnostics" to check the system's hardware and software.

TLS-250—Part of a Total Management System

Through an RS-232 port, TLS-250 can interface with sophisticated electronic point-of-sale terminals and cash registers to form an integrated station management system. And it can communicate to a headquarters location via telecommunications networks to speed inventory reporting and reconcile station totals automatically.

For complete information and a detailed brochure on TLS-250, contact your nearest Veeder-Root Distributor. Or call Veeder-Root at (203) 527-7201.

Veeder-Root Company, 70 Sargeant Street, Hartford, CT 06102.

Sensing probes can be installed in either a 3" or 4" riser pipe. Simple two-wire connection. Probes come in various lengths to suit tank sizes.

VEEDER-ROOT 
A SUBSIDIARY OF
WESTERN PACIFIC INDUSTRIES
PETROLEUM PRODUCTS

Capital Spending in the Oil Industry: A 20-Year Overview at Home and Abroad

(Millions of Dollars)

	1984		1983		1982		1981		1980	
	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign
Marketing	—	—	\$ 1,375	\$ 3,330	\$ 1,400	\$ 3,700	\$ 1,425	\$ 3,775*	\$ 1,300	\$ 3,750
Refining (a)	—	—	5,100	17,075	7,550*	19,525*	7,250	18,325	5,650	16,125
Transportation	—	—	1,000	7,725	1,300	7,650	1,725	10,300	2,150	7,725
Production	—	—	37,275	36,575	52,275*	43,400*	51,700	41,675	33,100	33,775
Other	—	—	850	1,500	1,025	1,600	900	1,525	700	1,250
Total	—	—	45,500	66,175	63,550*	78,875*	63,600	75,600	42,900	62,625

	1979		1978		1977		1976		1975	
	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign
Marketing	975	2,775	950	2,290	775	1,895	625	1,555	650	1,550
Refining (a)	4,625	14,385	4,050	13,275	3,770	10,965	3,775	7,635	3,600	8,270
Transportation	1,450	6,575	1,350	7,380	2,300	8,060	3,900*	12,350*	3,725	11,510
Production	24,600	24,465	17,650	20,055	15,180	17,280	13,460	12,315	9,380	9,875
Other	550	1,225	475	980	445	980	325	785	370	735
Total	32,200	49,425	24,475	43,900	22,400	39,180	22,085	34,640	17,725	31,900

	1974		1973		1972		1971		1970	
	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign
Marketing	650	1,565	850	1,630	1,100	1,725	1,350	2,030	1,450*	1,770
Refinery (a)	2,600	7,115	1,475	4,565	1,350	4,995	1,550	4,740	1,625	3,900
Transportation	1,660	9,760	550	7,230	425	4,580	675	3,435	550	2,915
Production	11,450	8,085	7,440	5,485	5,915	4,190	3,385	3,830	4,335	2,895
Other	325	550	325	445	260	450	290	515	265	420
Total	16,625	27,075	10,640	19,355	9,050	15,900	7,250	14,550	8,225	11,900

	1969		1968		1967		1966		1965	
	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign
Marketing	1,250	1,555	1,150	1,515	1,250	1,455	1,100	1,310	1,000	1,430
Refinery (a)	1,525	2,995	1,450	2,980	1,600	2,550	1,575	2,435	1,125	1,665
Transportation	400	2,600	475	2,280	400	1,740	300	1,755	265	1,510
Production	4,750	2,790	4,925	2,535	4,025	1,975	3,770	1,870	3,760	2,025
Other	250	260	350	240	375	205	380	180	225	170
Total	8,175	10,200	8,350	9,550	7,650	7,925	7,125	7,550	6,375	6,800

(a) Includes chemicals and petrochemicals.

*Peak years are indicated with asterisks.

Source: Chase Manhattan Bank, Capital Investments in The World Petroleum Industry.

Capital Requirements: A Five-Year Forecast

Conoco Inc., which is one of the few U.S. oil companies still making long-term projections for the domestic industry, added a new dimension to its annual forecast in 1985 with a report on capital investment needs through 1990.

[For other elements of the Conoco forecast, see the International and Supply/Demand sections of this issue].

Conoco believes the U.S. oil companies will need about \$340-billion in capital spending during the 1983-1990 period. The lion's share, \$300-billion, will be invested in the upstream side—exploration and production. The balance, about \$40-billion, will be allocated to refining, transportation and marketing.

(Conoco says it uses different factors than Chase Manhattan Bank in arriving at capital spending projections, so its figures cannot be compared to the CMB data on page 33 of this section.)

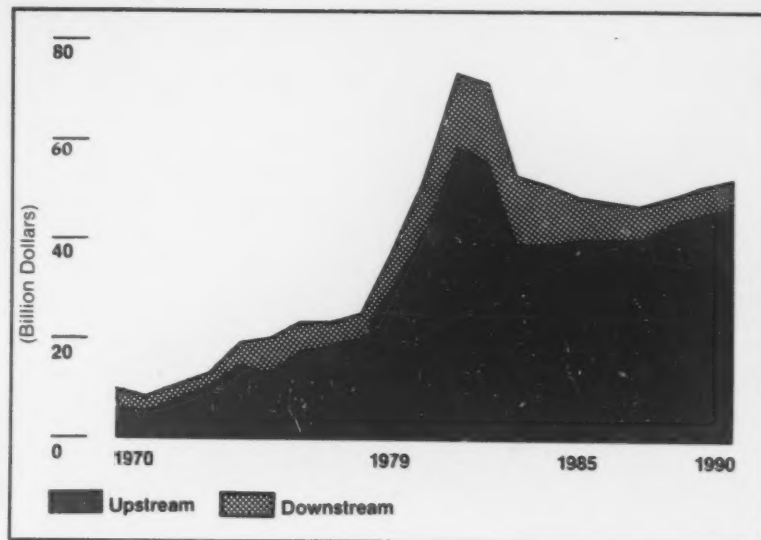
Here are highlights of the Conoco study:

The projected spending is three times average annual expenditures during the 1970s when price controls depressed U.S. crude oil and natural gas prices. These massive capital outlays will be required at a time when the industry's internal cash-generation capability has been impaired by lower oil prices. There is a danger, too, that proposed government fiscal measures could reduce industry cash flow even further.

Upstream Investment

Exploration, development and production, the upstream side of the business, will continue to require the bulk of the industry's capital outlays. Despite lowered oil price expectations, some \$250-billion will need to be invested from 1985 through 1990. This is only slightly less than spending during 1979-1984, which included unusually high outlays in 1981 and 1982 due to sharply higher world oil prices, expectations of future price increases, and U.S. oil price decontrol.

A \$250-billion upstream investment program is consistent with (1) a continued historically high level of drilling activity of around 80,000 wells per year, (2) stable to slowly rising expenditures per well, (3) historical average reserve additions per well, and (4) maintenance of reserves at eight to nine years of production. An



additional \$50-billion of upstream investment would be required to maintain domestic oil and gas production at current levels.

Downstream Outlook

The downstream sector—refining, transportation and marketing—will require a lesser share of petroleum industry investment in the future due to current excess capacity. Nevertheless, about \$40-billion will be needed over the 1985-1990 period to maintain and upgrade existing capacity. That is roughly the same as average annual downstream spending in the 1970s. Federal regulations requiring the phasedown of lead in gasoline will require significant investment in the octane enhancement capability of U.S. refineries. Also, considerable investment will be required to rationalize the natural gas and petroleum products pipeline networks to meet market needs.

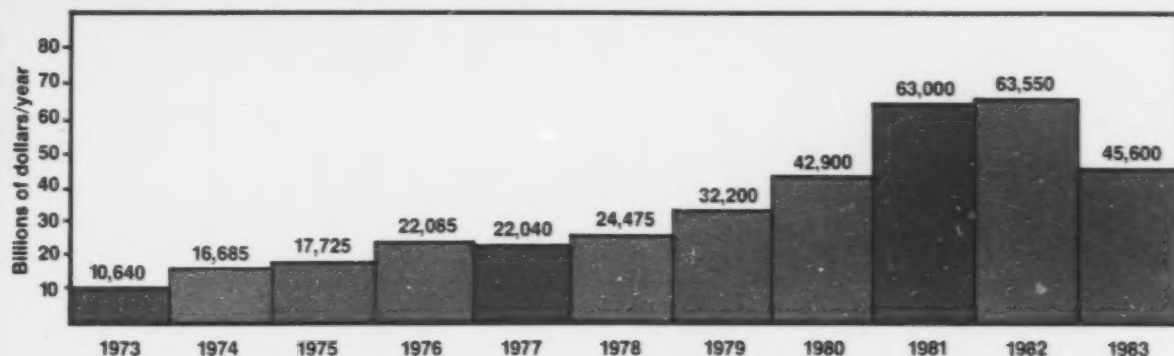
The U.S. petroleum industry is capable of obtaining the necessary funds for this aggressive investment program, either from internal sources or financial markets, the study says. This ability to fund required investment programs assumes that changes in taxation policies or other government regulations do not impair the industry's cash-generation capability.

Supply Problems

The United States will become increasingly dependent on potentially interruptible foreign oil supplies in the years ahead as oil demand grows very modestly but steadily and—despite the hundreds of billions of dollars that will be invested in exploration, development, and production—domestic oil production erodes. Past oil supply disruptions, which resulted in significantly reduced economic activity and employment, have occurred when import dependency was high. Thus, it is imperative that this nation take steps now that will reduce vulnerability to future oil supply interruptions.

Building up the Strategic Petroleum Reserve to the targeted level of 750-million bbl. as quickly as is fiscally responsible is an important step toward insulating the U.S. from an oil supply disruption. Emphasis must also be placed on finding and developing additional oil supplies in the United States and other politically stable areas. Unfortunately, the current softness in world crude prices discourages investments to develop such supplies because of high costs and risks. Therefore, it remains imperative that government policies encourage the major new investments that need to be made today by the U.S. energy industry if adequate and affordable energy supplies are to be available to future generations.

Capital Spending by U.S. Oil Companies



Spending by Divisions and Percentages (millions of dollars)

Marketing

3.0% (\$1,375)	1983
2.2% (\$1,400)	1982
2.3% (\$1,425)	1981
3.0% (\$1,300)	1980

Refining

11.2% (\$5,100)	1983
11.9% (\$7,500)	1982
11.5% (\$7,250)	1981
13.2% (\$5,560)	1980

Production

81.7% (\$37,275)	1983
82.3% (\$52,275)	1982
82.1% (\$51,700)	1981
77.2% (\$33,100)	1980

Transportation

2.2% (\$1,000)	1983
2.0% (\$1,300)	1982
2.7% (\$1,725)	1981
5.0% (\$2,150)	1980

Miscellaneous

1.9% (\$850)	1983
1.6% (\$1,025)	1982
1.4% (\$900)	1981
1.6% (\$700)	1980

FUNNY, IT DOESN'T LOOK LIKE A CPA.

But a Southwest dispenser keeps books like one: gathering, processing, and recording information with faultless precision. Even with CPA-like prudence, preserving a back-up data set.

Now that there's lots of entries in the station management arena, there's also lots of confusion. Southwest, as an elder statesman, would like to clear the air with some down-home common sense observations.

Basically, any station management system performs two jobs: gathering information and communicating that information.

Any EE will tell you that the communication and most of the information gathering involved are relatively simplistic tasks. But there's one information gathering job that's a real pistol: counting the gasoline.

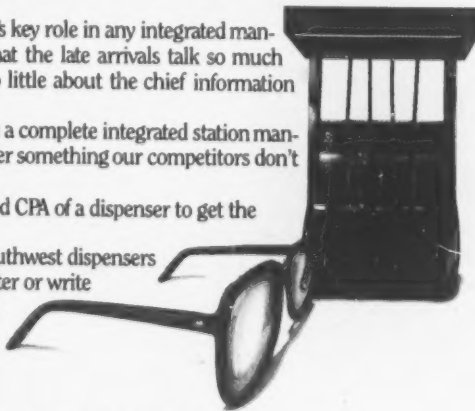
That job involves designing electronics delicate enough to accurately measure a volatile liquid yet sturdy enough to survive the unforgiving environment of a pump island.

Considering the dispenser's key role in any integrated management system, it's curious that the late arrivals talk so much about bells and whistles and so little about the chief information gathering device.

Naturally, Southwest offers a complete integrated station management system, but we also offer something our competitors don't seem to want to talk about.

A flinty-eyed, tough-minded CPA of a dispenser to get the toughest job done.

To find out more about Southwest dispensers and systems, call Rush Winchester or write Southwest Pump Company, P.O. Drawer 280, Bonham, Texas 75418, (214) 583-3134. Distributors and Jobbers nationwide.



SOUTHWEST
Energy Control Systems

WHAT WE'RE SELLING IS BETTER MANAGEMENT

Sales Offices: Los Angeles, CA (714) 751-0042; Denver, CO (303) 364-2632; Orlando, FL (305) 656-6521; Peoria, IL (815) 699-7068; Ft. Wayne, IN (219) 587-3211; Swartz, LA (338) 343-4227; Boston, MA (617) 849-1368; Cleveland, OH (216) 521-6942; Limestone, TN (615) 257-2871; Bonham, TX (214) 583-3171; Houston, TX (713) 462-7867; Seattle, WA (206) 288-5000. In Canada: Edmonton (403) 466-2677; Toronto (416) 673-2399.

How Oil Companies Handle

MAJOR OIL COMPANIES	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS			
			Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Amoco Oil Co.	15,652(A)	36	4,907	10,745	4,807	167
Atlantic Richfield	3,884(B)(C)	22	2,726	1,158	—	—
Chevron USA	10,618(D)	38(D)	5,192	5,426	10,517	98
Exxon Co. USA	18,139(F)	38	6,588	11,551	—	—
Mobil Oil Corp.	13,862	41	6,410	7,452	12,450	1,412
Shell Oil Co.	11,010	38	4,750	6,260	4,515(G)	235(G)
Texaco	19,558	46	3,895	15,663	3,006	143
SEMI-MAJOR OIL COMPANIES						
American Petrofina, Inc.	4,385(H)	22	0	4,385	—	—
Ashland Petroleum Co.	1,910	26	513	1,397	154	513
Citgo Petroleum Co.	3,599	31	83	3,516	52	31
Conoco Inc.*	5,091	40	—	—	—	—
Crown Central Petroleum Co.	188	7	—	—	—	—
Diamond Shamrock Corp.	2,060(I)	24	523	1,537	0	523
Kerr-McGee Refining Corp.	1,839(J)	18	138	1,701	1,772	67
Marathon Oil Co.	2,299	6	678	1,621	483	0
Murphy Oil Co.	591	14	489	102	207	384
Phillips Petroleum Co.	9,705(K)	34	284	9,501	—	190
Standard Oil Co. (Ohio)	8,560(L)	30	3,070	5,490	—	—
Sun Co.	6,425(M)	29	3,050	3,375	6,360	65
Tenneco Oil Co.	423	15	423	0	3	417
Union Oil Co. of Calif.	10,365	42	3,074	7,291	2,055	137
INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS						
Ada Resources.	115	1	53	62	10	11
Acme Retail, Inc.	40	2	35	5	—	—
Angus I. Hines, Inc.	40	1	—	—	6	22
Arkansas Valley Petroleum	34	2	34	0	25	9
Armour Oil Co.	85	5	85	0	—	—
A.T. Williams Oil Co.	70	2	—	—	0	70
Automatic Comfort Corp.	43	1	43	0	18	23
Bagwell Oil Co., Inc.	18	2	18	0	10	0
Barney Holland Oil Co.	71(N)	1	37	7	36	0
Beacon Oil Co.	275	3	150	175	200	75
Best Oil Co.	17	1	13	4	2	15
Boswell Oil Co.	—	5	—	—	—	—
Bray Terminals, Inc.	35	3	7	28	28	7
Brennan Petroleum Co.	3	1	—	—	—	—
Browning Oil Co.	30(O)	1	—	30	23	0
By Rite Oil Co.	93(P)	2	93	0	70	23
California Target Enterprises	150(Q)	1	150	0	0	0
Campbell Oil Co.	60	1	60	0	60	0
Cannon Oil Corporation	18	3	—	—	0	18
Cardon Corporation.	52	5	0	52	0	52
Cel Oil Products Corp.	16	1	16	0	2	6
Cenex.	1,067(R)	14	1,067	0	1,067	0
Certified Oil Co.	150	3	150	0	50	100
Charter Marketing Co.	437	9	437	0	68	369
Circle K Corporation	1,731(S)	22	—	—	—	—
Coast Oil Co.	59(T)	1	59	0	29	30
Coen Oil Co.	250	3	250	0	248	0
Colonial Oil Ind.	64(U)	7	64	0	0	64
Comet Oil Co.	4	2	4	0	—	—
Cook & Cooley Inc.	100	1	100	0	100	0
Consumers Gasoline Stations	31	3	31	0	0	31
Consumers Oil Corp.	16	2	16	0	4	11
Crystal Flash Petroleum Corp.	0	1	—	—	—	—
Crystal Petroleum Co.	15	1	15	0	15	0
Crystal U.S.A. Oil, Inc.	0	5	55	0	40	15
C.S.C. Oil Co.	21	2	21	0	0	21
Curtis Parker Oil Co. Inc.	46	1	34	12	46	0
Dairy Mart, Inc.	26	3	26	12	0	0
DeBlois Oil Co.	39(V)	2	39	0	8	31
Dennis K. Burke, Inc.	1	6	1	0	—	—
Desert Oil Co.	5	1	—	—	—	—
Dicky Inc.	6	1	6	0	0	6
Drake's Refining Station	14	1	14	0	0	14
D&W Oil Co.	3	—	3	0	—	—
East Coast Oil Corp.	33	1	33	0	0	33
E.M. Bailey Dist. Co.	44	3	23	21	40	2

† Includes District of Columbia.

*Did not respond—year-end 1983 data.

(A) Includes Omega Oil Co. (67 outlets).

(B) Includes Prestige Stations Inc.

(C) In May, Arco announced plans to withdraw from refining and marketing operations east of the Mississippi River, and concentrate on a five-state western region.

(D) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

Product Distribution

				BRANDED JOBBERS/COMMISSION AGENTS			
Commission- Operated	Full Service only	Self- Service only	Self- Service/ Full Service	Total	Number selling ...		
					Gasoline only	Fuel Oil only	Gasoline/ Fuel Oil
—	5%	25%	70%	1,832	—	—	—
0	2,716	294	7,608	133	133	0	0
0	—	—	—	568(E)	297	78	493
0(G)	582(G)	1,127(G)	3,041(G)	889	22	0	867
746	4,678	5,286	9,594	1,585	47	573	965
				658	10	83	565
				1,574	—	—	—
—	439	2,631	1,315	519	441	0	78
1,243	1,000	600	310	219	11	1	207
0	—	—	—	284	258	3	23
—	—	—	—	760	—	—	—
0	100	1,710	250	170	170	0	0
0	50	245	1,544	440	50	12	378
0	958	354	987	97	0	0	97
—	34	528	29	0	0	0	0
—	—	—	—	1,566	—	—	—
0	—	—	—	470	—	—	—
0	—	—	—	—	—	—	—
0	0	420	3	0	0	0	0
8,173	10%	25%	65%	404	5%	0	95%
—	—	11	10	16	0	0	16
—	0	40	0	40	35	0	5
12	4	34	2	—	—	—	—
0	0	34	0	0	—	—	—
—	—	85	—	0	—	—	—
0	0	70	0	—	—	—	—
2	17	25	1	1	1	0	0
8	12	6	0	0	—	—	—
1	22	2	13	1	0	—	—
0	0	200	75	60	60	0	1
0	2	15	0	0	—	—	—
—	—	—	—	—	—	—	—
0	28	7	0	6	0	0	6
—	—	—	—	0	—	—	—
7	8	3	19	0	—	—	—
0	45	23	25	0	—	—	—
0	0	150	0	0	—	—	—
0	30	20	10	0	—	—	—
0	0	18	0	0	—	—	—
0	0	49	3	0	—	—	—
8	3	13	0	—	—	—	—
0	0	0	1,067	1,067	0	0	1,067
0	0	0	150	0	—	—	—
0	10	427	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	35	24	0	—	—	—
2	90	10	150	0	—	—	—
0	7	5	52	0	—	—	—
—	—	—	—	0	—	—	—
0	0	100	0	0	—	—	—
0	8	22	1	—	—	—	—
1	16	0	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	5	10	1	1	0	0
0	15	30	10	0	—	—	—
0	0	8	13	0	—	—	—
0	9	13	25	2	0	0	2
38	1	37	0	—	—	—	—
0	24	13	3	0	—	—	—
—	1	0	0	0	—	—	—
—	—	—	—	0	—	—	—
0	1	5	0	2	—	—	2
0	2	10	2	0	—	—	—
—	3	—	—	0	—	—	—
0	0	33	0	0	—	—	—
2	34	2	8	7	—	—	7

(E) Includes 285 branded lube oil jobbers.

(F) Includes Alert stations.

(G) Figures are for direct-supplied stations only.

(H) Includes Finaserve Inc., Petron Inc., Porto Fina Oil Co.

(I) Includes Sigmar Retail, Autotronic Systems Inc.

(J) Includes Triangle Refineries (retail only).

BULK PLANTS				TERMINALS				MAJOR OIL COMPANIES
Company-Operated				Company-Operated				
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	
0	0	0	2,228	86	86	0	—	Amoco Oil Co.
0	0	0	—	43	43	0	—	Atlantic Richfield
28	3	25	829	89	88	1	19	Chevron USA
4	3	1	—	66	66	0	—	Exxon Co. USA
1,348	84	51	1,213	84	84	0	—	Mobil Oil Corp.
85	85	0	646	13	13	0	0	Shell Oil Co.
1,099	—	—	—	78	—	—	—	Texaco
SEMI-MAJOR OIL COMPANIES								INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	
0	—	—	415	9	9	0	1	American Petrofina, Inc.
156	1	138	17	42	42	0	0	Ashland Petroleum Co.
0	0	0	—	32	28	0	—	Citgo Petroleum Co.
0	—	—	—	62	—	—	—	Conoco Inc.
—	—	—	—	—	—	—	—	Crown Central Petroleum Co.
0	0	0	0	13	13	0	0	Diamond Shamrock Corp.
1	1	0	380	2	1	0	1	Kerr-McGee Refining Corp.
244	1	0	1	50	50	0	0	Marathon Oil Co.
0	0	0	0	22	22	0	—	Murphy Oil Co.
53	4	2	—	31	31	0	4	Phillips Petroleum Co.
90	0	90	—	57	57	0	—	Standard Oil Co. (Ohio)
—	—	—	—	39	—	—	—	Sun Co.
3	3	0	0	11	11	0	—	Tenneco Oil Co.
259	54	171	34	58	58	0	0	Union Oil Co. of Calif.
4	2	2	16	0	—	—	—	Ada Resources
0	—	—	—	0	—	—	—	Acme Retail, Inc.
6	6	0	—	0	—	—	—	Angus I. Hines, Inc.
0	—	—	—	0	—	—	—	Arkansas Valley Petroleum
0	—	—	—	3	3	—	—	Armour Oil Co.
4	0	4	—	—	—	—	—	A.T. Williams Oil Co.
2	2	0	0	2	2	0	0	Automatic Comfort Corp.
1	1	0	—	1	1	0	—	Bagwell Oil Co., Inc.
3	1	0	2	0	—	—	—	Barney Holland Oil Co.
20	0	0	20	58	0	58	0	Beacon Oil Co.
0	—	—	—	0	—	—	—	Best Oil Co.
—	—	—	—	3	3	0	—	Boswell Oil Co.
2	2	0	6	2	2	0	0	Bray Terminals, Inc.
0	—	—	—	0	—	—	—	Brennan Petroleum Co.
2	2	0	—	0	—	—	—	Browning Oil Co.
7	6	1	—	1	1	0	—	By Rite Oil Co.
0	—	—	—	0	—	—	—	California Target Enterprises
3	—	—	—	0	—	—	—	Campbell Oil Co.
0	—	—	—	0	—	—	—	Cannon Oil Corporation
0	—	—	—	0	—	—	—	Cardon Corporation
1	1	0	—	—	—	—	—	Cel Oil Products Corp.
0	0	0	960	7	7	0	0	Cenex
12	12	0	—	2	2	0	—	Certified Oil Co.
0	—	—	—	0	—	—	—	Charter Marketing Co.
0	—	—	—	0	—	—	—	Circle K Corporation
3	3	0	—	0	—	—	—	Coast Oil Co.
2	2	0	0	0	—	—	—	Coen Oil Co.
1	1	0	75	2	2	0	2	Colonial Oil Ind.
0	—	—	—	0	—	—	—	Comet Oil Co.
0	—	—	—	0	—	—	—	Cook & Cooley Inc.
—	—	—	—	—	—	—	—	Consumers Gasoline Stations
0	—	—	—	1	1	0	—	Consumers Oil Corp.
3	2	1	—	0	—	—	—	Crystal Flash Petroleum Corp.
1	0	0	0	0	—	—	—	Crystal Petroleum Co.
0	—	—	—	0	—	—	—	Crystal U.S.A. Oil, Inc.
0	—	—	—	0	—	—	—	C.S.C. Oil Co.
3	1	2	1	0	—	—	0	Curtis Parker Oil Co., Inc.
—	—	—	—	—	—	—	—	Dairy Mart, Inc.
3	3	0	—	1	1	0	—	DeBiosis Oil Co.
1	1	0	0	1	1	0	—	Dennis K. Burke, Inc.
0	—	—	—	0	—	—	—	Desert Oil Co.
3	3	0	0	0	—	—	0	Dicky Inc.
0	—	—	—	0	—	—	—	Drake's Refining Station
3	—	—	—	0	—	—	—	D&W Oil Co.
0	—	—	—	0	—	—	—	East Coast Oil Corp.
4	1	3	0	0	—	—	0	E.M. Bailey Dist. Co.

(K) Includes Aero Oil.

(L) Includes BP Oil Inc., Boron Oil Co., Truckstops of America.

(M) Includes Herr Gas & Oil Co., Mid-State Oil Co., Montou Auto Service Co. Inc., Mascot Petroleum Co., Stop-N-Go Foods Inc., King Kwik Mini Markets Inc.

(N) Includes Decatur Oil Co.

(O) Includes Tri-County Oil Co., Rally Marketing.

(P) Includes Beacon Oil Co.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS			
			Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Englefield Oil Co.	223	3	223	0	175	48
FCX, Inc.	98	2	98	0	0	98
Fireline Petroleum Inc.	430	11	430	0	0	430
Flying J Inc.	70	9	70	0	0	70
Fortmeyer's Inc.	—	1	—	—	—	—
Foster Oil Co.	40	1	39	1	33	7
Franko Oil Co.	96	2	90	96	50	46
Gas-N-Go, Inc.	1	1	1	0	0	1
Gasco Gasoline, Inc.	79	1	79	0	11	54
Gern Petroleum	327(W)	2	277	50	0	0
Giant Industries	10	3	—	—	0	10
Globe Oil Co. U.S.A.	103	6	—	—	—	—
Golden Gate Petroleum Co.	0	7	—	—	—	—
Gresham Petroleum Co.	23	1	23	0	7	4
Gull Industries, Inc.	100	2	100	0	0	7
Guttman Oil Co.	—	4	—	—	—	—
Harris Enterprises, Inc.	40	2	40	0	30	10
Hawaiian Independent Ref.	10(Y)	1	10	0	0	10
Highland Petroleum, Inc.	—	10	—	—	—	—
Highway Oil, Inc.	216(Z)	24	216	0	0	216
Hinkle Enterprises	11	1	11	0	7	4
Holland Oil Co.	53	1	53	0	20	33
Horkey Oil Co., Inc.	29	1	0	29	9	20
Huck's Convenience Store	110	5	95	15	0	110
Hughes Oil Co.	106	1	106	0	40	6
Hull Oil Co.	28	2	28	0	8	6
Hunt Oil Co.	175	5	1	174	25	100
Huntley Jiffy, Inc.	50	2	50	0	0	50
Independent Stations Co.	4	1	0	4	—	—
Jack Griffith Pet. Prod.	10	1	—	—	—	—
Jacobus Co.	10	1	—	—	—	—
J.H. Williams Oil Co.	80(AA)	1	77	3	77	3
J&L Oil, Inc.	59	3	59	0	5	54
Johnson Products, Inc.	67	6	59	8	0	59
J.S.&J. Service, Inc.	16(BB)	2	16	0	0	16
Kaibab Petroleum Co.	35	1	35	—	0	35
Kelley-Williamson Co.	45(CC)	2	35	10	33	12
Key Energy Enterprises Inc.	42(DD)	5	41	1	0	11
Kickapoo Oil Co. Inc.	56	1	56	—	—	56
Kimber Petroleum Corp.	175	1	175	—	165	10
Kimbro Oil Co.	38	1	—	—	30	8
Kingston Oil Supply Corp.	60(EE)	1	50	10	56	3
Kirschner Bros. Oil Co.	35	2	—	—	—	—
Kittie Petroleum Inc.	13	1	13	—	—	—
Kwik Shop Inc.	110	3	110	—	—	—
Land O'Lakes Inc.	387	8	384	3	384	3
Lido Co. of New England	100	3	100	—	—	—
Lyden Oil Co.	143	1	143	—	129	14
Mapco Petroleum Inc.	302	13	302	—	—	297
Martin Oil Marketing Ltd.	72	9	72	0	0	72
McDowell Oil Service Inc.	30	1	30	—	—	—
McLeese Oil Inc.	65	1	—	—	—	—
Merchants Oil	55	1	55	—	—	—
Merritt-Truax Inc.	83(FF)	2	67	16	43	31
Mid-Missouri Oil Co.	8	1	8	—	2	6
Milder Oil Co. Inc.	10	2	—	—	—	—
Miller Enterprises Inc.	100	1	62	38	—	100
Miller Oil Co.	3(GG)	1	—	3	3	—
Monarch Oil & Supply Co.	20	1	20	—	18	1
Musket Corp.	119	9	119	—	—	119
National Convenience Stores	73(HH)	11	51	22	0	25
National Oil Co.	103	9	—	103	103	—
National Oil & Gas Inc.	65	2	50	15	64	0
Newell Oil Co. Inc.	13	1	13	—	10	—
Noco Energy Corp.	21	1	21	—	—	21
Pacer Oil Co.	20	2	20	—	2	18
Pacific Northern Oil Co.	36	1	36	—	13	14
Parker Oil Co. Inc.	175	2	175	—	175	—
Peavey Oil Co.	8	1	8	—	4	4
Pennzoil Products Co.	630	7	58	32	38	20

(Q) Includes P&M Service Stations Inc.

(R) Includes Gas Up Inc.

(S) Includes Little General Stores, U-Tolem Stores.

(T) Includes Norcal Petroleum Co., Richards Distributors Inc., Mission Trail Oil Co., Coast Oil Stations Inc.

(U) Includes Interstate Stations Inc., Colonial Interstate Inc.

Product Distribution (cont'd.)

Commission- Operated	Full Service only	Self- Service only	Self- Service/ Full Service	Total	BRANDED JOBBERS/COMMISSION AGENTS		
					Number selling . . .		
					Gasoline only	Fuel Oil only	Gasoline/ Fuel Oil
0	55%	64%	104%	4	0	0	4
0	0	98	0	0	—	—	—
0	20	233	177	0	—	—	—
0	—	—	—	—	—	—	—
0	—	—	—	—	—	—	—
0	1	2	31	0	—	—	—
0	82	14	0	0	—	—	—
0	0	1	0	0	—	—	—
14	0	68	11	0	—	—	—
50	0	327	0	50	0	0	50
—	0	10	0	0	—	—	—
—	—	—	—	0	—	—	—
—	—	—	—	1	—	—	1
12	6	14	3	0	—	—	—
93	0	75	25	0	—	—	—
—	—	—	—	—	—	—	—
0	38	2	0	0	—	—	—
0	0	10	0	0	—	—	—
—	—	—	—	—	—	—	—
0	117	19	80	0	—	—	—
0	2	3	6	—	—	—	—
0	20	20	13	0	—	—	—
0	0	20	9	—	—	—	—
0	0	110	0	0	—	—	—
60	10	66	30	1	0	1	0
14	0	24	4	0	—	—	—
50	—	155	20	20	0	0	20
0	0	50	0	0	—	—	—
—	0	1	3	1	1	0	0
—	—	—	—	0	—	—	—
0	35	3	42	1	0	0	1
0	4	55	0	0	—	—	—
8	30	8	29	8	8	0	0
0	0	16	0	0	—	—	—
0	0	35	0	—	—	—	—
—	28	12	5	5	0	0	5
31	0	32	10	0	—	—	—
—	0	56	—	0	—	—	—
—	175	—	—	0	—	—	—
—	0	8	30	—	—	—	—
1	56	3	1	3	1	—	2
—	—	—	—	—	—	—	—
—	2	11	—	—	—	—	—
—	—	110	—	0	—	—	—
—	84	131	172	384	—	—	384
—	—	—	—	—	—	—	—
1	12	8	123	—	—	—	—
5	—	302	—	—	—	—	—
0	1	71	—	0	—	—	—
30	0	30	—	—	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—
9	40	43	—	0	—	—	—
—	1	7	—	0	—	—	—
—	—	—	—	—	—	—	—
—	—	100	—	2	—	—	2
—	—	—	3	—	—	—	—
1	18	1	1	0	—	—	—
—	—	119	—	0	—	—	—
48	0	73	—	0	—	—	—
—	—	103	—	15	—	—	15
1	10	5	50	14	—	—	14
3	3	—	10	—	—	—	—
—	16	5	—	—	—	—	—
—	1	19	—	—	—	—	—
9	36	—	—	0	—	—	—
—	15	150	10	—	—	—	—
—	8	—	—	—	—	—	—
0	38	20	0	161	—	—	—

(V) Includes Beacon Oil Co.
(W) Includes Smith Service Oil
(Y) Includes Promana Inc.

(Z) Includes Hi-Lo Co. Inc., Workingman's Friend Oil Inc., Cook Oil Co. Inc., Fairway Oil Inc.
(AA) Includes Pioneer Oil Co.
(BB) Includes Terminal Stations Inc.

BULK PLANTS				TERMINALS				MAJOR OIL COMPANIES
Company-Operated				Company-Operated				
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	
10	9	1	0	0	—	—	0	Englefield Oil Co.
23	—	—	—	0	—	—	—	FCX, Inc.
0	—	—	—	1	1	0	—	Fireline Petroleum Inc.
—	—	—	—	—	—	—	—	Flying J Inc.
1	—	—	—	0	—	—	—	Fortmeyer's Inc.
3	0	0	1	0	—	—	—	Foster Oil Co.
0	—	—	—	0	—	—	—	Franko Oil Co.
0	—	—	—	0	—	—	—	Gas-N-Go, Inc.
0	—	—	—	0	—	—	—	Gasco Gasoline, Inc.
1	0	1	1	0	—	—	—	Gem Petroleum
0	—	—	—	—	—	—	—	Giant Industries
0	—	—	—	0	—	—	—	Globe Oil Co. U.S.A.
2	2	0	0	3	3	0	0	Golden Gate Petroleum Co.
4	—	—	—	0	—	—	—	Gresham Petroleum Co.
0	—	—	—	0	—	—	—	Gull Industries, Inc.
9	—	—	—	11	—	—	—	Guttman Oil Co.
2	—	—	—	0	—	—	—	Harris Enterprises, Inc.
0	—	—	—	0	—	—	—	Hawaiian Independent Ref.
—	—	—	—	—	—	—	—	Highland Petroleum, Inc.
0	—	—	—	0	—	—	—	Highway Oil, Inc.
1	1	0	—	0	—	—	—	Hinkle Enterprises
0	—	—	—	0	—	—	—	Holland Oil Co.
2	2	0	—	0	—	—	—	Horkey Oil Co., Inc.
0	—	—	—	0	—	—	—	Huck's Convenience Store
2	2	0	1	0	—	—	0	Hughes Oil Co.
1	1	0	—	0	—	—	—	Hull Oil Co.
5	0	0	5	2	2	0	5	Hunt Oil Co.
0	—	—	—	0	—	—	—	Huntley Jiffy, Inc.
—	—	—	—	—	—	—	—	Independent Stations Co.
0	—	—	—	0	—	—	—	Jack Griffith Pet. Prod.
10	—	—	—	2	—	—	—	Jacobus Co.
4	3	1	0	0	—	—	0	J.H. Williams Oil Co.
0	—	—	—	0	—	—	—	J&L Oil, Inc.
0	—	—	0	0	—	—	0	Johnson Products, Inc.
0	—	—	—	0	—	—	—	J.S.&J. Service, Inc.
0	—	—	—	0	—	—	—	Kaibab Petroleum Co.
6	1	5	0	—	—	—	—	Kelley-Williamson Co.
2	2	—	—	0	—	—	—	Key Energy Enterprises Inc.
0	—	—	—	0	—	—	—	Kickapoo Oil Co. Inc.
0	—	—	—	0	—	—	—	Kimber Petroleum Corp.
—	—	—	—	—	—	—	—	Kimbro Oil Co.
6	6	—	2	8	7	—	1	Kingston Oil Supply Corp.
—	—	—	—	—	—	—	—	Kirschner Bros. Oil Co.
—	—	—	—	—	—	—	—	Kittie Petroleum Inc.
0	—	—	—	0	—	—	—	Kwik Shop Inc.
367	—	—	365	3	3	—	0	Land O'Lakes Inc.
—	—	—	—	—	—	—	—	Lido Co. of New England
3	3	—	—	—	—	—	—	Lyden Oil Co.
—	—	—	—	1	1	—	—	Mapco Petroleum Inc.
0	—	—	—	3	3	—	—	Martin Oil Marketing Ltd.
1	1	—	—	—	—	—	—	McDowell Oil Service Inc.
—	—	—	—	—	—	—	—	McLeier Oil Inc.
1	1	—	—	—	—	—	—	Merchants Oil
5	5	—	—	0	—	—	—	Merritt Truax Inc.
0	—	—	—	0	—	—	—	Mid-Missouri Oil Co.
1	—	—	—	—	—	—	—	Milder Oil Co. Inc.
—	—	—	—	—	—	—	—	Miller Enterprises Inc.
3	3	—	—	1	1	—	—	Miller Oil Co.
1	1	—	—	—	—	—	—	Monarch Oil & Supply Co.
0	—	—	—	0	—	—	—	Musket Corp.
0	—	—	—	0	—	—	—	National Convenience Stores
15	—	15	15	15	—	—	15	National Oil Co.
12	—	12	—	0	—	—	—	National Oil & Gas Inc.
1	—	—	1	—	—	—	—	Newell Oil Co. Inc.
2	2	—	—	1	1	—	—	Nuco Energy Corp.
2	2	—	—	—	—	—	—	Pacer Oil Co.
1	1	—	—	1	1	—	—	Pacific Northern Oil Co.
9	9	—	—	1	1	—	—	Parker Oil Co. Inc.
—	—	—	—	—	—	—	—	Peavey Oil Co.
15	3	3	9	5	3	0	2	Pennzoil Products Co.

(CC) Includes G.W. Corp.

(DD) Includes Key Food Marts Inc., Key Petroleum Inc., Key Fuelstops Inc.

(EE) Includes Amos Post Co., Paramount Oil Co.

(FF) Includes Columbia Sales

(GG) Includes Millar Company South

(HH) Includes Stop N Go Markets of Texas Inc., Colonial Food Stores Inc., Stop N Go Markets of Georgia Inc.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS			
			Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Pester Corp.	100	10	100	—	—	100
Pettway Oil Co.	46(II)	3	—	46	27	17
Petroleum Marketers Inc.	110(JJ)	2	110	0	9	31
Pilot Oil Corp.	106	11	104	2	—	106
Pride Oil Co. Inc. (Miss.)	25	2	25	—	3	1
Pride Oil Co. Inc. (Tenn.)	14	1	14	—	—	14
Publix Oil Co. Inc.	105(KK)	4	105	0	96	9
Quiktrip Corp.	201	4	201	—	—	201
Racetrac Petroleum Inc.	249	13	—	—	—	—
Republic Oil Corp.	4(LL)	1	4	—	—	4
Remote Services Inc.	268	9	268	—	—	—
Reynolds Industries Inc.	5(MM)	2	5	—	2	3
River Oil Co.	38(NN)	2	38	—	38	—
Robinson Oil Co. Inc.	22(OO)	1	22	—	—	22
Ross Resources, Inc.	21	2	21	0	10	11
Ryan-Dewitt Corp.	31	1	29	2	21	8
Sahara Oil Co., Inc.	22	1	22	0	4	17
Santee Oil Co., Inc.	57	1	57	0	53	4
Save-X, USA, Inc.	24(PP)	2	24	0	0	0
SCASCO	40	1	40	0	31	6
Schaeffer Oil, Inc.	5	5	28	3	0	0
Sears Oil Co., Inc.	12	1	12	0	11	1
Self Service Oil Co.	16	4	16	0	0	16
Shay Oil Co., Inc.	17	1	0	17	3	14
Shores Oil Co.	42	1	42	0	42	0
Shotmeyer Bros. Pet. Corp.	72	1	—	—	—	—
Shotmeyer Oil Corp.	37(OQ)	3	—	—	—	—
The SICO Co.	207	3	207	0	97	22
Simon Oil Co., Inc.	129	1	129	0	122	7
Smith-Shafer Oil Co.	6	1	6	0	0	6
SNO, Inc.	128(RR)	2	128	0	98	24
SOS Oil Co.	63	1	—	—	—	—
Southern Oil Co., Inc.	14	1	14	0	7	5
Spartan Petroleum Co. Inc.	59	2	59	0	59	0
The Spencer Companies Inc.	64(SS)	1	64	0	4	15
SSG Corporation	30	2	—	—	—	—
Steuart Pet. Co.	45	7	45	0	25	20
Sumrall Oil Serv., Inc.	85	2	85	0	83	2
Sunny Serv. Stations, Inc.	11	1	—	—	—	—
Taylor Oil Co.	54	2	54	0	0	0
TCR, Inc.	28	3	28	0	2	26
Texas City Refining, Inc.	26	8	26	0	0	26
Texas Star Oil Co.	34	1	34	0	0	34
Thornhill Oil Co., Inc.	26	1	—	—	—	—
Tooley Oil Co.	10	2	10	0	0	10
Tosco Corporation	9	0	—	—	—	—
Total Petroleum, Inc.	1,847(TT)	22	448	1,399	1,399	448
Town Pump & Affiliates	65	3	65	0	30	35
Transit Oil Co.	2	2	2	0	0	2
Trenton Oil Co., Inc.	50	2	50	0	45	0
Triton Incorporated	42	5	—	—	—	—
Thrifty Oil Co.	—	1	—	—	—	—
Truman Arnold Co.	85	6	85	0	0	49
Ultramar Pet. Inc.	93	2	75	18	53	30
United Marketing	285	3	285	—	—	285
United Refining Co.	291	3	291	—	5	286
United States Oil Inc.	9	1	9	—	1	1
Vicksburg Refining Inc.	27(VV)	2	17	10	1	4
Wake Up Oil Co. Inc.	42	1	42	—	1	41
Warelubco Inc.	90	8	89	1	—	—
Warren Equities Inc.	259	8	259	—	99	160
Wavaho Oil Co. Inc.	12	1	12	—	—	1
Webaco Oil Co. Inc.	10	1	10	—	—	10
Webb Oil Co.	20	1	20	—	10	10
Webster Oil Co.	25	3	25	—	19	3
Wesson Inc.	27	1	27	—	16	11
Western Marketing Inc.	28	1	28	—	2	26
Wickland Oil Co.	85(VV)	3	85	—	—	85
York Oil Co. Inc.	9(WW)	1	9	—	—	9
Zarda Brothers Dairy Inc.	6	2	3	—	3	5
Zephyr Inc.	55	3	50	5	5	50

(II) Includes Handy Andy Pantries.

(JJ) Includes Whiting Oil, Stop In Food Stores.

(KK) Includes Scotland Oil Co. Inc., Dalton Oil Co. Inc., Dalton Service Co. Inc., Hay Oil Co. Inc.

(LL) Includes Dixie Diesel Truck Stops.

(MM) Includes Port Oil Corp.

(NN) Includes River Oil Co. of Jackson, Tenn.

Product Distribution (cont'd.)

				BRANDED JOBBERS/COMMISSION AGENTS			
Commission- Operated	Full Service only	Self- Service only	Self- Service/ full Service	Total	Number selling . . .		
					Gasoline only	Fuel oil only	Gasoline/ fuel oil
—	0	98%	2%	—	—	—	—
—	2	17	27	—	—	—	—
2	—	31	79	0	—	—	—
—	1	105	0	0	—	—	—
21	1	23	1	0	—	—	—
—	—	12	2	—	—	—	—
—	10	74	21	0	—	—	—
—	—	201	—	0	—	—	—
—	—	—	—	—	—	—	—
—	—	4	—	—	—	—	—
268	—	268	—	268	265	—	3
—	5	—	—	—	—	—	—
—	—	—	—	—	—	—	—
—	—	22	0	0	—	—	—
0	0	18	3	0	—	—	—
2	4	6	21	2	—	—	—
1	2	20	0	2	—	—	—
0	41	4	12	0	2	0	0
24	0	24	0	0	—	—	—
3	25	5	10	0	—	—	—
28	0	28	0	—	—	—	—
0	10	2	0	0	—	—	—
0	0	16	0	16	16	0	0
0	0	17	0	1	0	0	1
0	20	0	22	0	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	0	—	—	—
88	85	108	19	0	—	—	—
0	82	14	33	0	—	—	—
0	0	6	0	0	—	—	—
6	41	46	41	6	6	—	—
—	59	0	4	0	—	—	—
2	10	3	1	0	—	—	—
0	0	25	34	0	—	—	—
20	6	31	28	2	0	0	3
—	—	—	—	—	—	—	—
0	0	45	0	0	—	—	—
0	0	75	10	—	—	—	—
—	—	—	—	—	—	—	—
54	0	54	0	0	—	—	—
0	1	27	0	0	—	—	—
0	0	26	0	0	—	—	—
0	0	34	0	0	—	—	—
—	—	—	—	—	—	—	—
0	0	10	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	790	1,057	1,399	0	0	1,399
0	0	65	0	65	0	0	65
0	0	2	0	0	—	—	—
5	50	0	0	0	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	0	—	—	—
38	0	85	0	1	0	0	1
10	52	30	11	5	2	0	3
—	140	144	1	0	—	—	—
—	163	128	—	—	—	—	—
8	1	6	2	0	—	—	—
22	1	26	—	1	—	—	—
—	3	—	39	0	—	—	1
—	1	5	84	0	—	—	—
—	64	165	30	—	—	—	—
11	—	3	9	—	—	—	—
—	—	10	—	—	—	—	—
—	—	10	10	—	—	—	—
3	2	15	8	—	—	—	—
12	11	4	0	—	—	—	—
—	—	27	1	—	—	—	0
—	1	84	—	0	—	—	—
0	—	9	—	—	—	—	—
—	5	3	—	—	—	—	—
—	16	29	10	5	—	—	5

(OO) Includes Trail Oil Co.

(PP) Includes Serv-N-Save Inc.

(QQ) Includes United States Oil Corp.

(RR) Includes Delmarva Oil Inc.

(SS) Includes Alabama Oil Co., MidSouth Oil Co.

(TT) Includes Huron Valley Oil Co.

BULK PLANTS				TERMINALS				MAJOR OIL COMPANIES	
Company-Operated				Company-Operated					
Total	Jobber-Operated Bulk Plants		Total	Jobber-Operated Terminals		Total			
	Salary-Operated	Commission-Operated		Salary-Operated	Commission-Operated				
—	—	—	—	—	—	—	—	Petrol Corp.	
1	—	—	—	—	—	—	—	Petroleum Marketers Inc.	
8	8	—	1	1	—	—	—	Pilot Oil Corp.	
0	—	—	0	—	—	—	—	Pride Oil Co. Inc. (Miss.)	
0	—	—	0	—	—	—	—	Pride Oil Co. Inc. (Tenn.)	
7	7	0	4	4	0	0	—	Publix Oil Co. Inc.	
1	—	1	—	—	—	—	—	Quiktrip Corp.	
0	—	—	—	—	—	—	—	Racetrac Petroleum Inc.	
0	—	—	0	—	—	—	—	Republic Oil Corp.	
3	3	—	—	—	—	—	—	Remote Services Inc.	
0	—	—	0	—	—	—	—	Reynolds Industries Inc.	
0	—	—	0	—	—	—	—	River Oil Co.	
6	4	2	1	1	—	0	—	Robinson Oil Co. Inc.	
2	0	2	0	—	—	0	—	Ross Resources, Inc.	
0	—	—	0	—	—	—	—	Ryan-Dewitt Corp.	
0	—	—	0	—	—	—	—	Sahara Oil Co., Inc.	
6	6	0	0	—	—	—	—	Santee Oil Co., Inc.	
0	—	—	0	—	—	—	—	Save-X, USA, Inc.	
0	—	—	4	4	0	—	—	SCASCO	
0	—	—	0	—	—	—	—	Schaeffer Oil, Inc.	
1	0	0	—	—	—	—	0	Sears Oil Co., Inc.	
1	—	—	0	—	—	—	1	Self Service Oil Co.	
1	1	0	—	—	—	—	—	Shay Oil Co., Inc.	
3	2	1	0	—	—	—	—	Shores Oil Co.	
19	19	0	1	1	0	—	—	Shotmeyer Bros. Pet. Corp.	
0	—	—	0	—	—	—	—	Shotmeyer Oil Corp.	
1	0	1	0	—	—	—	—	The SICO Co.	
7	7	0	1	1	0	0	—	Simon Oil Co., Inc.	
3	3	0	0	—	—	—	—	Smith-Shafer Oil Co.	
1	1	0	0	—	—	—	—	SMO, Inc.	
1	—	—	0	—	—	—	—	SOIS Oil Co.	
0	—	—	0	—	—	—	—	Southern Oil Co., Inc.	
0	—	—	0	—	—	—	—	Spartan Petroleum Co.	
0	—	—	7	7	0	—	—	The Spencer Companies Inc.	
0	—	—	0	—	—	—	—	SSG Corporation	
0	—	—	0	—	—	—	—	Stewart Pet. Co.	
0	—	—	2	2	0	—	—	Sumrall Oil Serv., Inc.	
0	—	—	0	—	—	—	—	Sunny Serv. Stations, Inc.	
0	—	—	2	2	0	—	—	Taylor Oil Co.	
0	—	—	0	—	—	—	—	TCR, Inc.	
3	3	0	—	—	—	—	—	Texas City Refining, Inc.	
0	—	—	0	—	—	—	—	Texas Star Oil Co.	
0	—	—	31	6	0	—	—	Thornhill Oil Co., Inc.	
12	2	0	15	6	0	9	—	Tooley Oil Co.	
2	2	0	0	—	—	—	—	Tosco Corporation	
0	—	—	0	—	—	—	—	Total Petroleum, Inc.	
0	—	—	0	—	—	—	—	Town Pump & Affiliates	
0	—	—	0	—	—	—	—	Transit Oil Co.	
0	—	—	3	—	—	—	—	Trenton Oil Co., Inc.	
0	—	—	1	1	0	0	—	Triton Incorporated	
7	6	1	4	4	0	0	—	Thrifty Oil Co.	
—	—	—	2	2	—	—	—	Truman Arnold Co.	
—	—	—	1	1	—	—	—	Ultramar Pet. Inc.	
0	—	—	0	—	—	—	—	United Marketing	
1	—	1	0	—	—	—	—	United Refining Co.	
0	—	—	0	—	—	—	—	United States Oil Inc.	
1	—	—	0	—	—	—	—	Vicksburg Refining Inc.	
1	1	—	0	—	—	—	—	Wake Up Oil Co. Inc.	
5	5	—	1	1	—	—	—	Warehubsco Inc.	
—	—	—	—	—	—	—	—	Warren Equities Inc.	
—	—	—	—	—	—	—	—	Wawa Oil Co. Inc.	
—	—	—	—	—	—	—	—	Webaco Oil Co. Inc.	
2	—	—	—	—	—	—	—	Webb Oil Co.	
—	—	—	0	—	—	—	—	Webster Oil Co.	
1	1	—	—	—	—	—	—	Wesson Inc.	
0	—	—	1	1	—	—	—	Western Marketing Inc.	
3	3	—	—	—	—	—	—	Wickland Oil Co.	
—	—	—	—	—	—	—	—	York Oil Co. Inc.	
2	—	2	2	2	—	—	—	Zarda Brothers Dairy Inc.	
—	—	—	—	—	—	—	—	Zephyr Inc.	

(UU) Includes Dinkins Petroleum Inc.

(VV) Includes Regal Stations Inc.

(WW) Includes Easy Go Stores.

Branded Retail Outlets

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England					Middle Atlantic			
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Acme Retail, Inc.	40	2	—	—	—	—	—	—	—	—	—
American Petroline Inc.	4,385(A)	22	—	—	—	—	—	—	—	—	—
Amoco Oil Company	15,652(B)	36	—	—	—	288	18	224	393	484	825
Angus I. Hines Inc.	40	1	—	—	—	—	—	—	—	—	—
Arkansas Valley Petro.	34	2	—	—	—	—	—	—	—	—	—
Ashland Oil Co.	1,910	15	—	—	—	—	—	—	—	—	61
Atlantic Richfield Co.	3,384 (TT) (UU)	22	—	9	12	191	54	115	298	149	841
A.T. Williams Oil Co.	70	2	—	—	—	—	—	—	—	—	—
Automatic Comfort Corp.	43	1	—	—	—	—	—	43	—	—	—
Bagwell Oil Co., Inc.	18	2	—	—	—	—	—	—	—	—	—
Best Oil Co.	17	1	—	—	—	—	—	—	—	—	17
Bray Terminals Inc.	35	3	—	—	4	4	—	—	27	—	—
Browning Oil Co.	30(D)	1	—	—	—	—	—	—	—	—	—
By Rite Oil Co.	93(E)	2	—	—	—	—	—	—	—	—	—
Campbell Oil Co.	70	1	—	—	—	—	—	—	—	—	—
Cannon Oil Corporation	18	3	—	—	—	—	—	—	—	—	—
Cardon Corporation	52	5	—	—	—	—	—	—	—	—	—
Cel Oil Products Corp.	16	1	—	—	—	—	—	—	—	—	—
Cenex	1,067(G)	14	—	—	—	—	—	—	—	—	—
Certified Oil Company	150	3	—	—	—	—	—	—	—	—	—
Charter Marketing Co.	437	9	3	12	—	71	—	67	—	—	—
Chevron Corporation	10,618(H)	38	82	19	4	65	11	178	442	237	197
Circle K Corporation	1,731(I)	22	—	—	—	—	—	—	—	—	—
Citgo Petroleum Corporation	3,599	31	158	64	55	120	5	82	388	235	75
Coen Oil Company	250	3	—	—	—	—	—	—	—	—	75
Colonial Oil Industries, Inc.	64(K)	3	—	—	—	—	—	—	—	—	—
Comet Oil Co.	4	2	—	—	—	—	—	—	—	—	—
Consumers Gasoline Stations Inc.	31	3	—	—	—	—	—	—	—	—	—
Consumers Oil Corp.	16	2	—	—	—	—	—	—	13	3	—
C.S.C. Oil Company	21	2	—	—	—	—	—	—	—	—	—
Crystal Petroleum Co. Inc.	55	5	—	—	—	—	—	—	—	—	—
Dairy Mart Inc.	26	3	—	—	—	(X)	(X)	(X)	—	—	—
DeBlois Oil Company	39(L)	2	—	—	—	13	26	—	—	—	—
Dennis K. Burke Inc.	1	1	—	—	—	1	—	—	—	—	—
Diamond Shamrock Refining & Marketing Co.	2,060(T)	24	—	—	—	—	—	—	4	—	1
Dickey Inc.	6	1	—	—	—	—	—	—	—	—	—
D&W Oil Co.	3	1	—	—	—	—	—	—	—	—	—
East Coast Oil Corp.	33	1	—	—	—	—	—	—	—	—	—
E.M. Bailey Dist. Co.	44	3	—	—	—	—	—	—	—	—	—
Englefield Oil Co.	223	2	—	—	—	—	—	—	—	—	—
Exxon Co., USA	18,139(M)	38	259	98	—	271	36	169	400	735	1,088
FCX, Inc.	98	2	—	—	—	—	—	—	—	—	—
Fireline Pet. Inc.	430	11	41	34	13	136	46	56	81	13	7
Flying J Inc.	70	9	—	—	—	—	—	—	—	—	—
Fortmeyer's, Inc.	(X)	1	—	—	—	—	—	—	—	—	—
Foster Oil Co.	40	1	—	—	—	—	—	—	—	—	—
Franko Oil Co.	96	2	—	—	—	—	—	—	—	—	—
Gas-N-Go, Inc.	1	1	—	—	—	—	—	—	—	—	—
Gasco Gasoline, Inc.	79	1	—	—	—	—	—	—	—	—	—
Gem Petroleum	327(N)	2	—	—	—	—	—	—	—	—	—
Giant Ind. Inc.	10	3	—	—	—	—	—	—	—	—	—
Globe Oil Co., USA	103	6	—	—	—	—	—	—	—	—	—
Gresham Pet. Co.	23	1	—	—	—	—	—	—	—	—	—
Gulf Ind., Inc.	100	2	—	—	—	—	—	—	—	—	—
Guttman Oil Co.	(X)	3	—	—	—	—	—	—	—	—	(X)
Harris Enterprises, Inc.	40	2	—	—	—	—	—	—	—	—	—
Hawaiian Independent Ref.	10(O)	1	—	—	—	—	—	—	—	—	—
Highland Petroleum, Inc.	(X)	10	—	—	—	—	—	—	—	—	—
Highway Oil, Inc.	216(P)	24	—	2	2	—	—	—	23	—	22
Hinkle Enterprises, Inc.	11	1	—	—	—	—	—	—	—	—	—
Holland Oil Co.	53	1	—	—	—	—	—	—	—	—	—
Horkley Oil Co., Inc.	29	1	—	—	—	—	—	—	—	—	—
Huck's Convenience Stores	110	5	—	—	—	—	—	—	—	—	—
Hughes Oil Co.	106	1	—	—	—	—	—	—	—	—	—
Hull Oil Co.	28	2	—	—	—	—	—	—	—	—	—
Hunt Oil Co.	175	6	—	—	—	—	—	—	—	—	—
Huntley Jiffy, Inc.	(X)	2	—	—	—	—	—	—	—	—	—
Independent Stations Co.	4	1	—	—	—	—	—	—	—	—	—
Jack Griffith Petroleum Prod.	10	1	—	—	—	—	—	—	—	—	—
Jacobus Co.	10	1	—	—	—	—	—	—	—	—	—
J.H. Williams Oil Co., Inc.	80(Q)	1	—	—	—	—	—	—	—	—	—
J&L Oil, Inc.	59	3	26	19	4	7	3	—	8	—	—
Johnson Prod., Inc.	67	6	—	—	—	—	—	—	—	—	—
J.S.&J. Service, Inc.	16(R)	2	—	—	—	—	—	—	—	—	—

† Includes District of Columbia

(X) Did not provide figures

(A) Includes Finaserve Inc., Petcon Inc., Porto Fino Oil Co.

(B) Includes Omega Oil Co. (67 outlets).

(C) Includes Decatur Oil Co.

(D) Includes Tri-County Oil Co., Rally Marketing Co.

(E) Includes Beacon Oil Co.

(F) Includes P&M Service Stations Inc.

in the United States

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	16	—	25	15	—	—	—	—	4	—	—	7	226	140	40
32	346	51	573	—	90	170	526	525	522	634	1,194	835	538	15	760	702	420
—	—	—	(X)	—	1,054	528	798	715	—	—	—	—	—	—	—	—	—
—	—	—	38	328	—	—	—	—	310	52	19	27	72	880	—	—	1
40	90	3	59	1	—	—	—	—	1	—	208	—	—	—	—	—	—
—	—	—	31	—	39	—	—	—	—	—	—	—	—	—	—	—	—
—	1	—	17	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	(X)	—	—	—
—	—	—	—	—	—	—	—	—	2	—	—	91	—	—	—	—	—
—	—	—	—	—	—	—	1	2	70	—	—	—	—	—	—	15	—
—	—	—	1	—	—	16	—	—	—	—	1	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	150	—	—	—	—
—	—	—	—	10	—	—	—	—	135	—	—	—	5	—	—	—	—
19	15	—	17	59	57	100	995	42	—	—	—	—	—	—	—	—	51
—	—	—	—	—	(X)	—	(X)	909	3	9	—	—	—	1,002	132	984	571
—	21	—	127	8	165	42	172	362	(X)	25	118	198	121	(X)	62	(X)	(X)
—	—	—	—	25	—	—	—	—	150	—	—	—	192	32	211	70	70
—	—	—	—	—	6	27	31	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	2	2	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	4	26	1	—
—	—	—	—	—	—	—	—	—	12	—	—	—	—	9	—	—	—
—	—	—	—	—	—	—	1	2	—	—	—	—	—	—	1	40	1
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	13	—	2	4	2	5	—	—	—	—	—	1	5	—	—
—	—	—	—	—	—	—	—	—	—	—	—	14	—	—	—	—	—
—	—	—	33	—	—	—	—	—	—	—	—	3	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	2	—	—	40	2	—	—
74	519	58	1,021	596	1,874	975	623	579	179	—	—	—	—	—	927	413	225
3	—	—	26	—	70	28	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	(X)	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	40	—	—	—	—	—
—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	50	277	—	—	—	—	—	—	—	—	—
—	—	—	—	—	5	11	68	18	—	—	—	—	—	—	—	1	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	23
—	—	—	—	(X)	—	—	—	—	(X)	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	5	—	—	5	—	—	1	30	32	10	—	3	—	8	7	2	2
—	—	—	—	—	—	—	—	—	53	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	5	91	—	—	5	5	—	—
—	—	—	—	—	—	—	—	106	—	—	—	—	—	—	—	1	—
—	—	—	—	—	—	—	—	27	—	—	—	—	—	—	—	75	35
—	—	—	—	—	—	—	(X)	5	(X)	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	80	—	—	—	—	10	—	—	—	—
—	—	—	—	—	—	—	6	—	—	—	39	—	14	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

(G) Includes Gas Up Inc.

(H) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

(I) Includes Little General Stores, U-Totem Stores.

(J) Includes Norcal Petroleum Co., Richards Distributors Inc., Mission Trail Oil Co., Coast Oil Stations Inc.

(K) Includes Interstate Stations Inc., Colonial Interstate Inc.

(L) Includes Beacon Oil Co.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England					Middle Atlantic			
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Kaibab Pet. Co.	35	1	—	—	—	—	—	—	—	—	—
Kelly-Williamson Co.	45(U)	2	—	—	—	—	—	—	—	—	—
Kent Oil Co.	25	1	—	—	—	—	—	—	—	—	—
Key Energy Enterprises, Inc.	80(V)	5	—	—	—	—	—	—	—	—	—
Kerr-McGee Refining Corp.	1,839(S)	22	—	—	—	—	—	—	—	—	—
Kickapoo Oil Co., Inc.	56	1	—	—	—	—	—	—	—	—	—
Kimber Petroleum Corp.	175	1	—	—	—	—	—	—	—	175	—
Kimbro Oil Co.	38	1	—	—	—	—	—	—	—	—	—
Kingston Oil Supply Co.	60(W)	1	—	—	—	—	—	—	60	—	—
Kirschner Bros. Oil Co.	35	2	—	—	—	—	—	—	—	20	15
Kittie Petroleum, Inc.	13	1	—	—	—	—	—	—	—	—	—
Kwik Shop, Inc.	110	3	—	—	—	—	—	—	—	—	—
Land O'Lakes, Inc.	387	8	—	—	—	—	—	—	—	—	—
Lank-Como Oil Co.	80	1	—	—	—	—	—	—	—	—	—
Lido Co. of New England	100	3	(X)	(X)	—	—	(X)	—	—	—	—
Lyden Oil Co.	143	1	—	—	—	—	—	—	—	—	—
Major Brands Dist.	(X)	5	—	—	—	—	—	—	—	—	—
MAPCO Petroleum Inc.	302	13	—	—	—	—	—	—	—	—	—
Marathon Petroleum Co.	2,299	6	—	—	—	—	—	—	—	—	—
Martin Oil Marketing, Ltd.	72	9	—	—	—	—	—	—	—	—	—
McDowell Oil Serv. Inc.	30	1	—	—	—	—	—	—	—	—	30
McLeiser Oil, Inc.	65	1	—	—	—	—	—	—	—	—	—
Merchants Oil	55	1	—	—	—	—	—	—	—	—	—
Merritt Truax, Inc.	83(Y)	2	—	—	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	8	1	—	—	—	—	—	—	—	—	—
Milder Oil Co., Inc.	10	2	—	—	—	—	—	—	—	—	—
Miller Enterprises, Inc.	36	1	—	—	—	—	—	—	—	—	—
Miller Oil Co.	42(Z)	2	—	—	—	—	—	—	—	—	—
Mobil Oil Corp.	13,862	41	266	183	142	635	79	473	1,757	464	1,192
Monarch Oil & Supply Co.	20	1	—	—	—	—	—	—	—	—	—
Murphy Oil USA, Inc.	591	14	—	—	—	—	—	—	—	—	—
Musket Corp.	119	9	—	—	—	—	—	—	—	—	—
National Convenience Stores	73(AA)	11	—	—	—	—	—	—	—	—	—
National Oil Co.	103	9	—	—	—	—	—	—	—	—	—
National Oil & Gas Co.	65	2	—	—	—	—	—	—	—	—	—
Newell Oil Co., Inc.	13	1	—	—	—	—	—	—	—	—	—
Noco Energy Corp.	21	1	—	—	—	—	—	—	21	—	—
Pacer Oil Co.	20	2	—	—	—	—	—	—	—	—	—
Pacific Northern Oil Co.	36	1	—	—	—	—	—	—	—	—	—
Parker Oil Co., Inc.	175	2	—	—	—	—	—	—	—	—	—
Peavey Oil Co.	8	1	—	—	—	—	—	—	—	—	—
Pennzoil Prods. Co.	630	7	—	—	—	—	—	—	16	—	174
Pester Corp.	100	10	—	—	—	—	—	—	—	—	—
Pettway Oil Co.	46(BB)	3	—	—	—	—	—	—	—	—	—
Petroleum Marketers, Inc.	110(CC)	2	—	—	—	—	—	—	—	—	—
Phillips Petroleum Co.	9,705(FF)	34	—	—	—	—	—	—	—	—	91
Pilot Oil Corp.	106	11	—	—	—	—	—	—	—	1	1
Pride Oil Co., Inc.	25	2	—	—	—	—	—	—	—	—	—
Pride Oil Co, Inc.	14	1	—	—	—	—	—	—	—	—	—
Publix Oil Co., Inc.	105(DD)	5	—	—	—	—	—	—	—	—	—
Quiktrip Corp.	201	4	—	—	—	—	—	—	—	—	—
Racetrac Pet., Inc.	249	13	—	—	—	—	—	—	—	—	—
Republic Oil Corp.	4(EF)	1	—	—	—	—	—	—	—	—	—
Remote Services, Inc.	268	9	—	4	—	—	—	—	13	—	—
Reynolds Ind. Inc.	5(GG)	2	1	—	—	4	—	—	—	—	—
River Oil Co.	38(HH)	2	—	—	—	—	—	—	—	—	—
Robinson Oil Co., Inc.	22(II)	1	—	—	—	—	—	—	—	—	—
Ross Resources, Inc.	21	2	—	—	—	—	—	—	—	—	—
Ryan-Dewitt Corp.	31	1	—	—	—	—	—	—	31	—	—
Sahara Oil Co., Inc.	22	1	—	—	—	—	—	—	—	—	—
Santee Oil Co., Inc.	57	1	—	—	—	—	—	—	—	—	—
Save-X, USA, Inc.	35	12	—	—	—	—	—	—	—	—	—
SCASCO	40	1	—	—	—	—	—	40	—	—	—
Schaffer Oil Inc.	31	5	—	—	—	—	—	—	—	—	—
Sears Oil Co. Inc.	12	1	—	—	—	—	—	—	12	—	—
Self Service Oil Co.	16	4	—	—	—	—	—	—	—	—	—
Shay Oil Co., Inc.	17	1	—	—	—	—	—	—	—	—	—
Shell Oil Company	11,010	38	—	9	—	164	39	126	236	195	—
Shores Oil Company	42	1	—	—	—	—	—	—	—	—	—
Shotmeyer Bros. Petroleum Corp.	72(KK)	1	—	—	—	—	—	—	72	—	—
Shotmeyer Oil Corp.	37	3	—	—	—	—	—	—	1	35	—
SICO Company	207	3	—	—	—	—	—	—	—	57	149
Simon Oil Company Inc.	129	1	—	—	—	—	—	—	129	—	—
Smith-Shafer Oil Co.	6	1	—	—	—	—	—	—	—	—	—
SMO Inc.	128(LL)	2	—	—	—	—	—	—	—	—	—

(M) Includes Alert stations

(N) Includes Smith Service Oil

(O) Includes Promana Inc.

(P) Includes Hi-Lo Co. Inc., Workman's Friend Oil Inc., Cook Oil Co. Inc., Fairway Oil Inc.

(Q) Includes Pioneer Oil Co.

(R) Includes Terminal Stations Inc.

(S) Includes Triangle Refineries (retail only).

(T) Includes Sigmor Retail, Autotronic Systems Inc.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England					Middle Atlantic			
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
SOS Oil Corp.	63	1	—	—	—	—	—	—	63	—	—
Southern Oil Co. Inc.	14	1	—	—	—	—	—	—	—	—	—
Spartan Petroleum Co., Inc.	59	2	—	—	—	—	—	—	—	—	—
The Spencer Companies Inc.	64(MM)	1	—	—	—	—	—	—	—	—	—
SSG Corporation	30	2	—	—	—	—	—	—	—	—	—
The Standard Oil Company (Ohio)	8,560(PP)	30	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)
Stewart Petroleum Co.	45	3	—	—	—	—	—	—	—	—	—
Sumrail Oil Services, Inc.	85	2	—	—	—	—	—	—	—	—	—
Sun Refining & Marketing Co. Inc.	6,425(QQ)	29	25	36	—	336	109	148	545	550	844
Sunny Service Stations	11	1	—	—	—	—	—	—	—	—	—
Taylor Oil Co.	54	2	—	—	—	—	—	—	—	—	—
TCR Inc.	28	3	—	—	—	—	—	—	—	—	—
Tenneco Oil Company											
Processing and Marketing	423	15	—	—	—	—	—	3	—	—	—
Texaco Inc.	19,558	46	170	102	96	453	86	293	457	420	817
Texas City Refining Inc.	26	8	—	—	—	—	—	—	—	—	—
Texas Star Oil Co.	34	1	—	—	—	—	—	—	—	—	—
Thornhill Oil Company Inc.	26	1	—	—	—	—	—	—	—	—	—
Tooley Oil Company	10	2	—	—	—	—	—	—	—	—	—
Tosco Corporation	(X)	9	—	—	—	—	—	—	—	—	—
Total Petroleum, Inc.	1,847(NN)	22	—	—	—	—	—	—	—	—	—
Town Pump Inc. & Affiliates	65	3	—	—	—	—	—	—	—	—	—
Transit Oil Company	2	2	—	—	—	—	—	—	—	—	—
Trenton Oil Co., Inc.	50	1	—	—	—	—	—	—	—	—	—
Triton Incorporated	42	5	—	—	—	—	—	—	—	49	1
Thrifty Oil Co.	(X)	1	—	—	—	—	—	—	—	—	—
Truman Arnold Companies	85	6	—	—	—	—	—	—	—	—	—
Ultramar Petroleum Inc.	93	2	—	—	7	—	—	—	86	—	—
Union Oil Co. of California	10,365	42	—	—	—	—	—	2	2	2	29
United Marketing	285	3	—	—	—	—	—	—	144	—	124
United Refining Co.	291	3	—	—	—	—	—	—	145	—	129
United States Oil Co., Inc.	9	1	—	—	—	—	—	—	—	—	—
Vicksburg Refining Inc.	27(OO)	2	—	—	—	—	—	—	—	—	—
Wake Up Oil Co. Inc.	42	1	—	—	—	—	—	—	—	—	—
Warelubco Inc.	90	6	—	—	—	—	—	—	—	—	—
Warren Equities, Inc.	259	6	5	7	—	66	58	45	22	43	13
Wavaho Oil Co. Inc.	12	1	—	—	—	—	—	—	—	—	—
Webaco Oil Co. Inc.	10	1	—	—	—	—	—	—	10	—	—
Webb Oil Company	20	1	—	—	—	—	—	—	—	—	—
Webster Oil Company	25	3	—	—	—	—	—	—	—	—	—
Wesson Inc.	27	1	—	—	—	—	—	27	—	—	—
Western Marketing, Inc.	28	1	—	—	—	—	—	—	—	—	—
Wickland Oil Co.	85(RR)	3	—	—	—	—	—	—	—	—	—
York Oil Co., Inc.	9(SS)	1	—	—	—	—	—	—	—	—	—
Zarda Bros. Dairy, Inc.	7	2	—	—	—	—	—	—	—	—	—
Zephyr Inc.	55	2	—	—	—	—	—	—	—	—	—

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Neb.	Kan.
Ada Resources	115	1	—	—	—	—	—	—	—
American Petrofina Inc.	4,385(A)	22	25	10	153	6	35	62	199
Amoco Oil Company	15,652(B)	36	610	388	534	291	284	186	248
Arkansas Valley Petro.	34	2	—	—	—	—	—	—	—
Armour Oil Co.	85	5	—	—	—	—	—	—	—
Ashland Oil Co.	1,910	15	83	15	4	1	5	—	—
Atlantic Richfield Co.	3,384(TT) (UU)	22	—	—	—	—	—	—	—
Barney Holland Oil Co.	71(C)	1	—	—	—	—	—	—	—
Beacon Oil Co.	275	3	—	—	—	—	—	—	—
Brennan Petroleum Co.	3	1	—	—	—	—	—	—	—
California Target Enterprises Inc.	150(F)	1	—	—	—	—	—	—	—
Cardon Corporation	52	5	—	—	—	—	—	—	—
Cenex	1,067(G)	14	319	3	—	258	157	4	—
Charter Marketing Co.	437	9	—	—	—	—	—	—	—
Chevron Corporation	10,616(H)	38	—	—	—	—	—	—	—
Circle K Corporation	1,731(I)	22	—	—	(X)	—	—	—	(X)
Citgo Petroleum Corporation	3,599	31	14	—	2	—	—	—	—

(CC) Includes Whiting Oil, Stop In Food Stores.

(DD) Includes Scotland Oil Co. Inc., Dalton Oil Co. Inc., Dillon Service Co. Inc., Hay Oil Co. Inc.

(EE) Includes Dixie Diesel Truck Stops.

(FF) Includes Aero Oil.

(GG) Includes Port Oil Corp.

(HH) Includes River Oil Co. of Jackson, Tenn.

(II) Includes Trail Oil Co.

South Atlantic									East North Central					East South Central				
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	14	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	4	55	—	—	—	—	—	—	—	—	—	—	64	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	28	—	—	—	—	
(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)	(X)	(X)	
—	25	4	16	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
54	141	24	72	54	150	24	—	37	571	247	428	465	—	143	36	—	84	
—	—	—	9	—	45	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	5	9	—	—	—	—	—	—	—	14	—	
—	—	—	7	1	23	32	44	112	—	—	—	—	—	11	37	22	10	
56	267	11	697	82	935	435	589	773	—	191	470	—	194	270	532	680	381	
—	—	—	—	—	—	—	5	9	—	—	—	—	—	—	—	12	—	
—	—	—	—	—	—	—	—	—	—	—	26	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	3	5	3	511	28	3	19	5	—	
—	—	—	—	—	—	—	—	—	—	1	—	—	—	1	—	—	—	
—	—	—	5	—	10	9	18	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	
—	7	—	337	171	631	260	604	708	513	336	400	612	433	133	505	828	397	
—	—	—	9	—	—	—	—	—	17	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	17	42	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	8	—	3	62	—	—	—	1	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	12	—	
—	—	—	—	—	—	—	—	—	—	—	—	20	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	9	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	55	—	—	—	—	—	

West South Central					Mountain					Pacific						
Ark.	La.	Okla.	Texas	Mont.	Idaho	Wyo.	Colo.	N.M.	Ariz.	Utah	Nev.	Wash.	Ore.	Calif.	Alaska	Hawaii
203	121	249	115	—	—	—	—	164	—	—	—	—	—	—	—	—
—	521	—	1,374	—	108	124	236	—	—	27	—	—	—	—	—	—
—	—	33	—	—	—	—	—	—	1	—	2	42	1	39	—	—
—	—	—	—	15	—	—	—	—	32	6	42	290	205	1217	—	19
—	—	—	71	—	—	—	—	—	—	—	5	—	6	264	—	—
—	—	—	—	—	—	—	—	—	3	—	—	—	—	150	—	—
—	—	4	—	—	—	—	—	—	44	2	—	—	—	—	—	—
—	—	—	—	23	28	7	—	—	—	16	—	62	40	—	—	—
34	83	—	106	—	—	—	—	—	219	146	112	502	337	2,141	112	156
(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	—	—
117	204	34	120	—	—	—	—	—	—	—	—	—	—	49	—	—

(JJ) Includes Serv-N-Save Inc.

(KK) Includes United States Oil Corp.

(LL) Includes Delmarva Oil Inc.

(MM) Includes Alabama Oil Co., Midsouth Oil Co.

(NN) Includes Huron Valley Oil Co.

(OO) Includes Dinkins Petroleum Inc.

(PP) Includes BP Oil Inc., Boron Oil Co., Truckstops of America.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Nebr.	Kan.
Coast Oil Company	49(J)	1	—	—	—	—	—	—	—
Cook & Cooley Inc.	100	1	—	—	—	—	—	—	—
Crystal Petroleum Co.	15	1	—	—	—	—	—	—	—
Curtis Parker Oil Co. Inc.	46	1	—	—	—	—	—	—	—
Desert Oil Co.	5	1	—	—	—	—	—	—	—
Diamond Shamrock									
Refining & Marketing Co.	2,080(T)	24	—	—	9	—	—	21	41
Dickey Inc.	6	1	—	6	—	—	—	—	—
Exxon Co., USA	18,139(M)	38	—	—	—	86	7	1	—
Flying J Inc.	70	9	—	—	(X)	—	—	—	—
Franko Oil Co.	96	2	—	—	—	—	—	—	—
Gasco Gasoline, Inc.	79	1	—	—	—	—	—	—	—
Giant Ind., Inc.	10	3	—	—	—	—	—	—	—
Gull Ind., Inc.	100	2	—	—	—	—	—	—	—
Harris Enterprises, Inc.	40	2	—	—	—	—	—	—	—
Hawaiian Indep. Ref., Inc.	10(O)	1	—	—	—	—	—	—	—
Highway Oil, Inc.	216(P)	24	—	1	12	1	4	1	24
Hinkle Enterprises, Inc.	11	1	—	—	—	—	—	—	—
Horkey Oil Co.	29	1	—	—	—	—	—	—	—
Huck's Convenient Stores	110	5	—	—	4	—	—	—	—
Hunt Oil Co.	175	6	—	—	—	—	—	—	—
Jack Griffith Pet. Prod., Inc.	10	1	—	—	—	—	—	—	—
J.S. & J Service, Inc.	16(R)	2	—	—	—	—	—	—	—
Kaibab Pet. Co.	35	1	—	—	—	—	—	—	—
Kent Oil Co.	25	1	—	—	—	—	—	—	—
Kerr-McGee Refining Corp.	1,839(S)	22	51	144	103	10	36	123	150
Kittie Petroleum, Inc.	13	1	—	—	—	—	—	—	—
Kwik Shop, Inc.	110	3	—	28	—	—	—	30	52
Land O'Lakes, Inc.	387	8	94	133	—	7	—	68	3
Major Brands Dist.	(X)	5	—	—	—	—	—	—	—
MAPCO Petroleum Inc.	302	13	—	—	1	—	—	—	5
Martin Oil Marketing, Ltd.	72	9	1	—	—	—	—	—	—
Merchants Oil	55	1	—	—	—	—	—	—	—
Merritt Truax Inc.	83(Y)	2	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	8	1	—	—	8	—	—	—	—
Milder Oil Co., Inc.	10	2	—	(X)	—	—	—	(X)	—
Mobil Oil Corp.	13,862	41	431	165	407	99	—	2	—
Murphy Oil USA, Inc.	591	14	61	—	—	—	—	—	—
Musket Corp.	119	4	—	—	3	—	—	—	24
National Convenience Stores	73(AA)	11	—	—	—	—	—	—	—
National Oil Co.	103	9	—	—	4	—	—	4	3
Newell Oil Co., Inc.	13	1	—	—	—	—	—	—	—
Pacer Oil Co.	20	2	—	—	—	—	—	—	—
Pacific Northern Oil Co.	36	1	—	—	—	—	—	—	—
Peavey Oil Co.	8	1	—	—	—	—	—	—	—
Pester Corp.	100	10	—	100	—	—	—	—	—
Phillips Petroleum Co.	9,705(FF)	34	412	409	710	37	111	260	326
Quiktrip Corp.	201	4	—	47	39	—	—	—	52
Racetrac Pet., Inc.	249	13	—	—	—	—	—	—	—
Republic Oil Corp.	4(EF)	1	—	—	—	—	—	—	—
Remote Services, Inc.	268	9	—	1	—	—	—	—	—
Robinson Oil Co., Inc.	22(II)	1	—	—	—	—	—	—	—
Ross Resources, Inc.	21	2	—	—	—	—	—	—	20
Sahara Oil Co., Inc.	22	1	—	—	—	—	—	—	—
Shaffer Oil Inc.	31	5	2	—	—	7	—	—	—
Self Service Oil Co.	16	4	—	1	5	—	11	4	—
Shay Oil Co., Inc.	17	1	—	—	—	—	—	—	—
Shell Oil Company	11,010	38	—	46	221	—	—	—	—
SSG Corporation	30	2	2	—	—	—	—	—	—
The Standard Oil Company (Ohio)	8,560(PP)	30	—	—	—	—	—	—	—
Sumrall Oil Services, Inc.	85	2	—	—	—	—	—	—	—
Sun Refining & Marketing Co.	6,425(QQ)	29	—	571	258	—	—	18	24
Sunny Service Stations Inc.	11	1	—	—	—	—	—	—	—
Tenneco Oil Company									
Processing & Marketing	423	15	—	—	—	—	—	—	—
Texaco Inc.	19,558	46	258	381	626	—	97	197	348
Texas Star Oil Co.	34	1	—	—	—	—	—	—	—
Tooley Oil Company	10	2	—	—	—	—	—	—	—
Total Petroleum, Inc.	1,847(NN)	22	64	124	371	3	31	78	284
Town Pump Inc. & Affiliates	65	3	—	—	—	—	—	—	—
Truman Arnold Companies	85	6	—	—	—	—	—	—	—
Union Oil Co. of California	10,365	42	308	76	9	2	9	3	1
Vicksburg Refining Inc.	27(OO)	2	—	—	—	—	—	—	—
Warelubco, Inc.	90	6	—	14	2	—	—	—	—
Western Marketing, Inc.	28	1	—	—	—	—	—	—	—
Wickland Oil Co.	85(RR)	3	—	—	—	—	—	—	—
Zarda Bros. Dairy, Inc.	7	2	—	—	1	—	—	—	7

(QQ) Includes Herr Gas & Oil Co., Mid-State Oil Co., Montour Auto Service Co. Inc.

Masco Petroleum Co., Stop-N-Go Foods Inc., King Kwik Mini Markets Inc.

(RR) Includes Regal Stations Inc.

(SS) Includes Easy Go Stores.

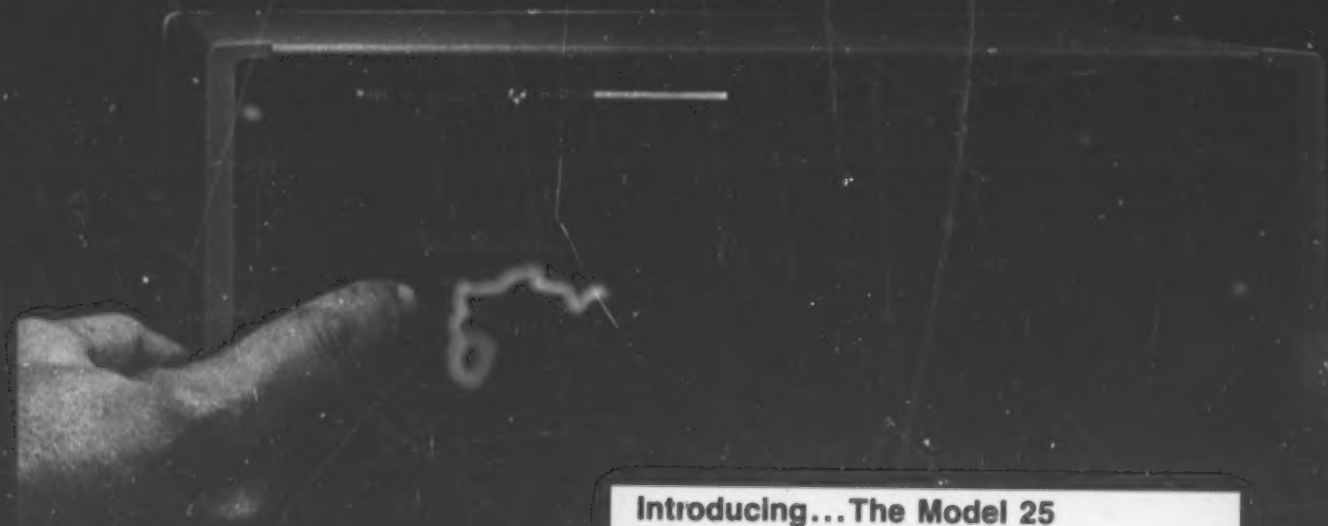
(TT) Includes Prestige Stations Inc.

(UU) In May 1985, Arco announced plans to withdraw from refining and marketing operations east of the Mississippi River and concentrate on a five-state western region.

West South Central				Mountain									Pacific				
Ark.	La.	Oklia.	Texas	Mont.	Idaho	Wyo.	Colo.	N.M.	Ariz.	Utah	Nev.	Wash.	Ore.	Calif.	Alaska	Hawaii	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	15	—	—	—	—	—	—	—	—	—	—	100	—	—	
—	46	—	—	—	—	5	—	—	—	—	—	—	—	—	—	—	
34	27	123	1,450	—	4	15	134	96	—	47	3	3	—	17	—	—	
670	875	118	2,831	287	62	31	133	174	316	32	39	304	167	1,086	—	—	
—	—	—	—	(X)	(X)	(X)	—	—	(X)	(X)	(X)	(X)	(X)	(X)	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	14	82	—	—	—	
—	—	—	—	—	—	—	1	4	5	—	—	—	—	79	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	75	25	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	(X)	(X)	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10	
—	—	11	12	—	—	4	3	—	—	—	—	—	—	—	—	—	
—	—	—	29	—	—	—	—	—	—	—	—	—	—	—	—	—	
10	15	10	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	10	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	35	—	—	—	—	15	—	—	
223	7	416	25 214	—	—	—	—	20	—	—	—	—	—	—	—	—	
—	—	—	13	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	(X)	(X)	(X)	(X)	—	—	—	—	(X)	—	—	—	—	
31	26	26	22 1	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	55	—	—	—	—	—	—	1	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	2	81	—	—	—	
76	258	75	1,119	—	—	—	—	9	192	—	25	282	278	1,462	—	—	
14	36	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
1	1	75	4	—	—	—	8	2	—	—	—	—	—	—	—	—	
—	(X)	(X)	(X)	—	—	—	(X)	—	(X)	—	(X)	—	—	(X)	—	—	
—	10	21	47	—	—	—	—	9	2	—	—	—	—	—	—	—	
(X)	—	(X)	13	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	36	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	8	—	—	—	
234	143	576	1,296	—	101	46	281	156	—	138	7	—	—	—	—	—	
—	—	63	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
4	10	—	10	—	—	—	—	—	—	—	—	—	—	4	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	22	—	—	
—	—	—	1	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	7	—	—	22	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	17	—	—	—	—	—	—	—	
118	449	—	636	—	43	—	26	116	53	17	55	328	269	1,578	—	67	
(X)	—	(X)	(X)	—	—	—	—	(X)	—	—	—	—	—	(X)	—	—	
—	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
12	—	497	6	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	11	—	—	—	
—	42	—	65	—	—	—	14	—	—	—	—	—	—	—	—	—	
424	772	757	2,827	—	82	80	345	189	173	163	65	449	352	1,427	59	50	
—	—	—	34	—	—	—	—	—	—	—	2	—	—	8	—	—	
12	6	202	28	(X)	(X)	(X)	44	11	12	—	—	—	—	—	—	—	
45	2	1	19	—	—	—	17	—	—	—	—	—	—	—	—	—	
56	29	3	51	—	11	—	1	2	139	35	56	315	231	1,877	104	137	
—	2	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	20	—	—	—	—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	—	5	—	1	79	—	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	

A Major Breakthrough in Station Control

Never before has so much been made so simple.



Introducing...The Model 25 UniTouch™ Command Console

Complete management and station control...
At Your Fingertips

UniTouch™ is an entirely new concept in self-service control consoles. It provides complete command of all operating functions merely by touching a display on the screen. Automatic visual prompting makes it simple to use...easier to learn.

The Complete, Retrofit Operations Management System (OMS)

UniTouch™ teams up with our Series 90 computer and Model 20 controller to provide all the electronic management capability you'll ever need...at a fraction of the cost for new dispenser systems.

Programmable features include: ■ Control for 1 to 32 hoses ■ 6 price levels ■ 6 fuel grades ■ 4 credit card types ■ Manager PIN ■ Allocation limit ■ Slow-down point ■ Changeable headings (on site) for fuel grades, receipts, credit cards ■ Automatic remote price posting

Plus: ■ Stacking memory and current sales status ■ Tank inventory and low level alarm ■ Complete diagnostic service record ■ Four shift totals ■ Battery back-up

Includes: A wide selection of system options.



Series 90
solid state
computer

For full information...
call Warren Hampton,
800-325-4010 or write:

UniDynamics St. Louis, Inc.
1326 Ashby Road
St. Louis, MO 63132

A Subsidiary of UniDynamics Corporation



UniDynamics
St. Louis

Average Number of Employees

(As of Jan. 1, 1984)

	Mining	Manufacturing		Transportation		Wholesale	Retail	
	Oil and Gas Extraction	Petroleum Refining	Oil and Greases	Pipelines, Except Gas	Gas Distribution	Petroleum Products	Gasoline Stations	Total
Alabama	1,758	402	29	104	2,998	4,558	7,375	17,224
Alaska	7,535	160	0	1,143	289	523	1,205	10,855
Arizona	163	76	0	100	964	1,304	7,311	9,918
Arkansas	3,946	765	†	†	2,448	2,594	4,414	14,167
California	40,081	27,624	662	1,040	10,941	15,776	59,222	155,346
Colorado	26,446	600	32	107	2,397	3,022	8,456	41,062
Connecticut	177	124	77	15	1,302	2,622	9,088	13,385
Delaware	40	1,032	11	0	346	351	1,360	3,140
District of Columbia	0	123	0	0	704	285	1,087	2,199
Florida	1,062	64	123	57	2,253	6,621	28,240	38,620
Georgia	113	109	138	510	3,602	6,013	14,818	25,303
Hawaii	†	413	0	0	353	503	3,577	4,846
Idaho	149	0	0	†	466	1,603	2,100	4,318
Illinois	6,116	6,729	791	1,022	8,659	10,727	23,648	57,892
Indiana	934	3,026	227	469	3,035	3,917	14,009	25,617
Iowa	30	0	56	172	1,136	2,975	11,177	15,548
Kansas	15,565	3,140	308	1,864	4,575	2,680	7,253	35,405
Kentucky	3,409	3,574	54	159	3,155	3,010	8,891	22,252
Louisiana	79,200	12,400	†	1,300	7,000	5,800	8,400	114,100
Maine	14	0	0	†	†	1,216	2,519	3,749
Maryland	0	0	229	0	1,266	3,530	12,815	17,840
Massachusetts	68	79	320	8	4,796	3,521	13,691	22,483
Michigan	4,117	1,996	436	217	8,096	5,040	19,981	39,887
Minnesota	†	†	†	196	2,457	2,677	14,510	19,840
Mississippi	8,100	1,660	120	151	2,170	3,530	4,670	20,401
Missouri	165	†	377	252	5,010	6,827	14,282	26,913
Montana	3,780	1,026	0	92	117	1,529	2,406	8,930
Nebraska	223	15	154	97	3,601	1,758	6,078	11,926
Nevada	313	38	0	20	555	402	3,332	4,660
New Hampshire	1	0	3	3	315	450	2,350	3,122
New Jersey	110	8,300	1,020	165	2,054	4,034	19,205	34,868
New Mexico	12,988	971	22	301	3,771	1,774	4,029	23,856
New York	2,680	11,145	373	126	7,083	11,002	28,229	60,638
North Carolina	13	0	175	116	2,427	5,087	9,193	17,011
North Dakota	5,387	240	0	172	665	2,377	2,019	10,860
Ohio	11,283	5,794	624	673	7,715	5,996	27,289	59,374
Oklahoma	74,870	7,648	280	2,454	5,773	7,124	6,373	104,532
Oregon	82	†	†	†	1,391	2,173	7,292	10,938
Pennsylvania	4,868	11,953	1,300	730	6,702	10,968	26,472	64,993
Rhode Island	28	0	†	0	848	572	2,313	3,761
South Carolina	14	†	†	†	718	3,411	6,904	11,047
South Dakota	124	3	0	62	130	1,426	2,490	4,235
Tennessee	763	318	53	45	1,744	4,558	12,084	19,565
Texas	252,408	40,931	913	5,245	29,375	25,589	34,788	389,249
Utah	4,493	863	†	83	2,992	1,945	4,065	14,441
Vermont	†	0	†	0	124	282	1,856	2,062
Virginia	200	200	†	100	2,500	7,400	13,700	24,100
Washington	214	1,654	81	84	1,551	2,972	9,279	15,715
West Virginia	5,866	482	64	133	5,454	2,065	3,731	17,795
Wisconsin	16	†	0	149	2,017	3,713	13,234	20,028
Wyoming	196,551	15,972	12	4,432	11,900	13,942	33,643	276,452
TOTAL	776,444	171,551	9,054	24,188	184,844	223,974	586,433	1,976,488

†Unavailable

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1984."

With AFI/Datatrol, you don't have to be big in the petroleum industry to have the right connections.

If you'd like to be well connected to the major networks, you should link-up with AFI/Datatrol. We're an innovator in management terminals with more connections to more major networks than anyone else. We'll show you how a network or networks can be beneficial to your business as well as provide you with whatever's necessary to make the important links.

With our family of terminals, you can reduce data communication costs by using shared networks

such as: Buypass, CompuServe, Control Data, JCPenney, McDonnell Douglas/Tymshare, National Data Corporation, Sears and many others.

Whether you choose your own private network or use another, or whether you need the speed of leased line or the economy of dial, there is a solution from AFI/Datatrol.

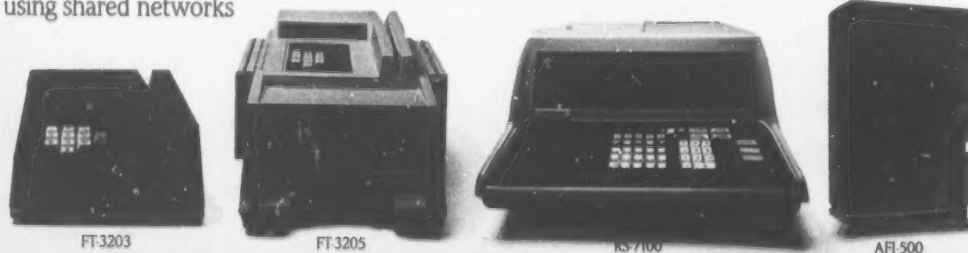
And that's just the beginning of what AFI/Datatrol terminals can do for your business. They also quickly and accurately perform cash, credit and debit

transactions, provide shift reports, time and attendance summaries, continuous inventory data and much more. Like interfacing to pumps, island card readers, tank gauges and other electronic equipment in your business.

Every one of our terminals can be used right away using our standard programs, and if you have special requirements, AFI/Datatrol is a supplier that acts as a partner to help you design and develop a system that's right for you.

What's more, we back-up our equipment with a nationwide customer service and support organization.

So if you want the right connections in the petroleum industry, connect with AFI/Datatrol, your missing link to the major networks.



FT-3203

FT-3205

RS-7100

AFI-500

I'd like to have the right connections.

Please send me more information.

Name _____
Title _____
Company _____
Address _____
City _____
State _____ Zip _____
Telephone _____

Addressograph Farrington Inc.



Brent Drive
Hudson, MA 01740
(617) 508-1411

6/85

How Distillates Were Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Distillates Use in 1983	% Share of Total Distillates Use in 1982
Residential ...	171,783	190,760	(5.0%)	17.5%	18.5%
Commercial ...	72,809	75,699	(3.8)	7.4	7.8
Industrial ...	69,332	71,340	(2.8)	7.1	7.3
Farm ...	66,697	68,453	(2.6)	6.8	7.0
Sub-total (a)	380,621	396,252	(3.9)	38.8	40.6
Oil Company ...	29,957	29,482	1.6	3.1	3.0
Elec. Utils.	11,744	12,134	(3.2)	1.2	1.2
Railroads ...	91,681	93,150	(1.2)	9.3	9.6
Vessels ...	33,785	33,855	(0.2)	3.4	3.5
Highway diesel ...	362,276	338,006	7.2	36.9	34.7
Military ...	15,924	15,201	(4.8)	1.6	1.6
Off-Highway diesel ...	36,737	37,118	(1.0)	3.7	3.8
All other ...	19,201	19,639	(2.2)	2.0	2.0
U.S. Total ...	961,927	974,864	0.7		

(a) For a general consideration, the sum of the residential, commercial, industrial and farm is roughly comparable to the old "heating" category, which was discontinued in 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How Residual Was Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Residual Use in 1983	% Share of Total Residual Use in 1982
Commercial ...	46,763	65,781	(28.9%)	9.0%	10.5%
Industrial ...	89,573	122,619	(27.0)	17.3	19.6
Sub-total (a)	136,336	188,400	(27.6)	26.3	30.1
Oil Company ...	32,820	45,319	(27.6)	6.3	7.2
Elec. Utils.	204,238	227,419	(10.2)	39.4	36.3
Railroad ...	140	170	(17.6)	—	—
Vessels ...	136,290	152,586	(10.7)	26.3	24.4
Military ...	5,411	7,829	(30.9)	1.0	1.2
All other ...	3,389	4,784	(29.2)	0.7	0.8
U.S. total ...	518,604	626,510	(17.2)		

(a) Separate space-heating category no longer exists. The sum of the commercial and industrial categories roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How Kerosine Was Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Kerosine Use in 1983	% Share of Total Kerosine Use in 1982
Residential ...	15,205	16,789	(9.3%)	32.8%	35.7%
Commercial ...	5,294	5,347	(1.0)	11.4	11.4
Industrial ...	6,703	6,480	3.4	14.4	13.8
Sub-total (a)	27,202	28,596	(4.9)	58.7	60.1
Farm ...	1,305	1,346	(3.0)	2.8	2.3
All other ...	17,845	17,015	4.9	38.5	36.2
U.S. Total ...	46,352	46,963	(1.3)		

(a) Separate heating category no longer exists. The sum of the residential, commercial and industrial roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How New Homes Are Heated

Fuel Oil hung on grimly in the Northeast in 1983 but slipped badly in the surprise gains it made in the North Central in 1982. Fuel oil got 17% of the new home construction in New England, down 1% from the preceding year. It got literally nothing in the North Central, however, where it had scored a 3% boost in 1982. Its nationwide growth was a small 1%.

Region	New Homes Completed (Add 000)	Share of New Homes by Fuels and percentages			
		Gas	Electric	Oil	Other
Northeast ...	106	38%	36%	17%	9%
North Central ...	142	65	24	—	9
South ...	476	34	62	—	3
West ...	200	53	40	—	8
Total 1983 ...	924	43%	49%	1%	6%
Total 1982 ...	632	40%	50%	3%	6%

Source: U.S. Department of Commerce, Construction Reports 25-83-13, July 1984.

Gas: Who Uses It for Heat

Gas added another half-million-plus customers in 1983, but the rate of increase declined again for the third consecutive year. In the total of new customers the net additions were down 10.4%. In new homes, however, gas bounded up 18%. Conversions were another story. They were down 46.3%.

Region	% of Gas-Heated Homes to Total Gas-Using Homes	Consumers Added in 1983 (Add 000)		
		New Homes	Existing Homes	Total Added
New England ...	65.8%	8.2	15.0	23.2
Mid-Atlantic ...	63.3	29.9	49.5	79.4
East North Central ...	93.9	59.1	31.9	91.0
West North Central ...	96.9	29.9	4.8	34.7
South Atlantic ...	90.5	70.7	15.6	86.3
East South Atlantic ...	97.0	15.9	2.0	17.9
West South Atlantic ...	98.0	76.0	1.4	77.4
Mountain ...	98.5	55.3	1.6	56.9
Pacific ...	94.6	101.4	9.6	111.0
Total ...	88.7	446.4	131.4	577.8
% Change '83 vs. '82 ...		+ 18.3%	- 46.3%	- 10.4%

Source: American Gas Assn., Home Heating Survey, 1983.

Gas Heat Equipment Shipments

Everything came up roses for gas-fired equipment sales in 1984 as 1983's upswing continued unabated, according to Gas Appliance Manufacturers Assn. Furnaces were up 11% and boilers 22%. Water heaters rose 10%.

Class and Type of Equipment	1984	1983	% Change
Central Heating:			
Furnaces ...	1,849,200	1,661,765	11.3%
Boilers ...	179,870	147,710	21.8
Space Heating:			
Wall Furnaces Vented ...	179,310	168,310	6.5
RV Systems ...	190,470	176,103	8.2
Water Heaters:			
Gas ...	3,502,053	3,172,067	10.4
Electric ...	3,480,845	3,131,017	11.2
Oil (a) ...	30,000	29,000	3.4

(a) Estimate provided by fuel oil industry source for comparison.
Source: Gas Appliance Manufacturers Assn.

Distillate Sales in 1983 . . .

(Add 000 bbl.)

Destination	Residential		Commercial		Industrial		Oil Company	
	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1								
New England States								
Connecticut	11,676	12,277	2,837	2,983	1,039	1,092	30	32
Maine	4,713	4,956	1,351	1,421	422	444	12	13
Massachusetts	17,251	18,139	5,254	5,525	1,492	1,569	36	38
New Hampshire	3,074	3,232	564	593	247	260	8	8
Rhode Island	2,352	2,473	413	434	185	194	11	11
Vermont	1,331	1,399	483	508	127	134	5	5
Central Atlantic States								
Delaware	853	897	395	415	91	96	37	39
District of Columbia	485	510	429	451	5	5	2	2
Maryland	5,881	6,184	1,688	1,775	1,147	1,206	53	56
New Jersey	18,401	19,349	6,706	7,051	6,074	6,387	115	121
New York	30,198	31,753	12,970	13,638	3,629	3,816	277	291
Pennsylvania	19,746	20,763	4,503	4,735	4,784	5,030	268	283
Lower Atlantic States								
Florida	690	726	620	652	1,275	1,341	207	218
Georgia	155	163	993	1,044	864	908	142	149
North Carolina	4,683	4,924	845	888	1,089	1,145	45	47
South Carolina	1,080	1,136	385	405	462	486	58	61
Virginia	4,803	5,050	1,414	1,487	1,168	1,228	1,391	1,463
West Virginia	824	866	288	303	1,490	1,567	160	168
Total	128,196	134,797	42,138	44,308	25,590	26,908	2,858	3,005
PAD District 2								
Illinois	2,513	2,675	2,949	3,139	2,681	2,854	516	549
Indiana	3,978	4,234	1,358	1,445	2,201	2,343	145	155
Iowa	1,988	2,116	616	649	567	603	21	22
Kansas	163	174	137	146	841	895	613	653
Kentucky	610	649	462	492	2,749	2,926	160	170
Michigan	5,948	6,331	2,008	2,137	1,368	1,456	99	105
Minnesota	5,848	6,224	931	991	769	819	87	93
Missouri	1,060	1,128	987	1,051	783	833	82	87
Nebraska	345	367	281	299	200	213	26	30
North Dakota	860	915	198	211	271	288	440	468
Ohio	4,229	4,501	1,982	2,110	3,345	3,561	294	313
Oklahoma	1	1	148	157	1,057	1,125	1,551	1,651
South Dakota	823	876	268	285	101	107	16	17
Tennessee	380	404	1,050	1,118	1,249	1,329	88	94
Wisconsin	7,128	7,587	1,205	1,282	616	656	36	38
Total	35,874	38,182	14,574	15,512	18,798	20,008	4,178	4,446
PAD District 3								
Alabama	57	55	249	238	1,761	1,686	76	73
Arkansas	15	14	145	139	510	488	103	99
Louisiana	88	84	363	348	3,668	3,512	7,244	6,936
Mississippi	0	0	119	114	692	663	1,213	1,161
New Mexico	25	24	585	560	644	617	229	219
Texas	30	29	5,112	4,894	4,312	4,128	8,439	8,080
Total	215	206	6,573	6,293	11,587	11,084	17,304	16,568
PAD District 4								
Colorado	61	58	159	151	680	644	105	100
Idaho	292	277	496	470	448	425	3	3
Montana	372	353	194	184	286	271	107	101
Utah	132	125	404	383	809	767	286	271
Wyoming	32	30	371	352	1,672	1,585	3,173	3,008
Total	888	843	1,634	1,540	3,895	3,692	3,674	3,483
PAD District 5								
Alaska	1,107	1,128	473	482	713	726	5	5
Arizona	0	0	22	23	1,031	1,050	1	1
California	71	72	4,330	4,410	4,706	4,794	1,865	1,896
Hawaii	0	0	54	55	82	83	215	219
Nevada	155	158	76	77	230	234	5	5
Oregon	2,078	2,117	985	1,003	1,373	1,399	25	25
Washington	2,188	2,257	1,960	1,996	1,327	1,352	29	30
Total	6,609	6,732	7,900	8,046	9,462	9,638	1,945	1,981
U.S. Total	171,783	180,790	72,808	75,689	68,232	71,248	28,967	29,482

... By Categories and Uses

(Add 000 bbl.)

Destination	Electric Utility		Farm		Military		Railroad		Vessel Bunkering	
	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1										
New England States										
Connecticut	64	17	81	85	1,029	982	6	6	16	17
Maine	58	54	108	114	60	57	125	131	84	88
Massachusetts	336	672	65	68	688	657	229	241	168	177
New Hampshire	21	12	39	41	1	1	1	1	10	11
Rhode Island	19	18	10	11	4	4	20	21	30	31
Vermont	21	16	88	93	0	0	6	6	5	5
Central Atlantic States										
Delaware	123	74	121	127	0	0	26	27	5	5
District of Columbia	574	247	0	0	326	311	68	72	0	0
Maryland	762	589	332	349	315	301	462	486	473	497
New Jersey	735	283	122	128	109	104	492	517	1,640	1,724
New York	655	954	925	973	244	233	882	928	595	626
Pennsylvania	2,095	1,410	941	989	88	84	1,447	1,522	294	309
Lower Atlantic States										
Florida	508	367	555	583	82	78	1,581	1,662	2,820	2,965
Georgia	9	219	693	729	91	87	2,015	2,119	552	580
North Carolina	394	277	1,452	1,527	43	41	937	985	95	100
South Carolina	102	145	534	561	56	54	420	442	88	93
Virginia	181	291	428	450	274	261	2,036	2,141	557	586
West Virginia	399	455	103	108	0	0	1,147	1,206	150	158
Total	7,056	6,100	6,597	6,936	3,410	3,255	11,900	12,513	7,582	7,972
PAD District 2										
Illinois	396	386	3,057	3,254	26	25	4,464	4,751	88	94
Indiana	182	504	2,281	2,428	28	27	3,215	3,422	95	101
Iowa	110	63	3,246	3,455	40	38	2,052	2,184	33	35
Kansas	92	228	1,902	2,024	19	18	3,951	4,205	0	0
Kentucky	192	270	632	673	21	20	2,501	2,662	2,589	2,735
Michigan	417	317	2,127	2,264	148	141	1,148	1,222	49	52
Minnesota	21	8	3,897	3,935	21	20	1,636	1,742	225	239
Missouri	190	116	3,650	3,885	30	28	2,536	2,699	649	691
Nebraska	47	28	2,714	2,888	9	8	963	1,025	0	0
North Dakota	113	78	1,682	1,790	181	172	869	925	47	50
Ohio	259	474	1,598	1,701	11	10	4,789	5,097	31	33
Oklahoma	51	59	628	688	0	0	1,356	1,443	0	0
South Dakota	30	92	1,354	1,441	27	26	199	212	0	0
Tennessee	143	184	725	772	8	8	2,627	2,796	1,313	1,398
Wisconsin	128	223	1,975	2,101	13	12	912	971	88	88
Total	2,371	3,030	31,268	33,280	582	565	33,218	36,388	5,182	5,488
PAD District 3										
Alabama	71	33	839	803	9	9	3,369	3,225	1,297	1,242
Arkansas	0	217	3,121	2,988	6	6	2,873	2,751	152	146
Louisiana	130	288	1,902	1,821	238	227	2,756	2,639	4,934	4,724
Mississippi	0	44	1,734	1,660	5	5	919	880	686	657
New Mexico	29	112	248	238	17	16	2,189	2,096	0	0
Texas	623	685	6,595	6,315	3,503	3,344	13,404	12,834	8,713	8,342
Total	863	1,379	14,438	13,825	3,778	3,607	25,510	24,425	15,782	15,111
PAD District 4										
Colorado	1	68	1,339	1,289	52	50	1,985	1,882	0	0
Idaho	0	0	758	719	20	19	601	570	0	0
Montana	0	0	985	839	2	2	1,479	1,402	0	0
Utah	55	27	248	235	2	2	1,307	1,239	0	0
Wyoming	112	6	296	271	1	1	2,984	2,810	0	0
Total	168	103	3,616	3,333	77	74	8,336	7,983	0	0
PAD District 5										
Alaska	589	582	14	14	230	220	35	36	839	854
Arizona	0	75	808	817	12	11	1,210	1,232	0	0
California	0	180	8,142	8,283	5,481	5,232	7,008	7,138	1,828	1,880
Hawaii	636	619	400	408	2,202	2,102	15	15	64	65
Nevada	40	20	78	79	15	14	718	731	0	0
Oregon	18	16	584	585	22	21	2,588	2,616	989	977
Washington	3	11	1,053	1,073	115	110	1,163	1,185	1,551	1,580
Total	1,296	1,822	10,877	11,879	8,677	7,719	12,717	12,963	3,230	3,338
U.S. Total	11,744	12,134	88,897	88,463	18,884	18,261	91,881	93,188	33,786	33,885

Distillate Sales in 1983 (Continued)

(Add 000 bbl.)

Destination	On-Highway		Off-Highway		All Other		Total	
	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1								
New England States								
Connecticut	3,203	2,698	239	251	66	69	20,286	20,509
Maine	1,731	1,564	231	243	99	104	8,994	9,189
Massachusetts	5,378	4,745	294	309	117	123	31,308	32,263
New Hampshire	900	744	162	170	10	11	4,937	5,084
Rhode Island	721	679	36	38	67	70	3,868	3,984
Vermont	722	352	164	173	15	16	2,967	2,707
Central Atlantic States								
Delaware	1,024	921	127	134	17	18	2,819	2,753
District of Columbia	475	436	9	9	164	172	2,537	2,215
Maryland	4,610	4,023	310	326	386	406	16,419	16,198
New Jersey	8,717	8,093	494	519	1,208	1,270	44,813	45,546
New York	8,948	8,353	589	619	403	424	60,315	62,608
Pennsylvania	16,048	15,296	2,031	2,136	483	508	52,729	53,065
Lower Atlantic States								
Florida	19,081	13,098	295	310	478	503	28,792	22,503
Georgia	13,321	11,801	182	191	378	397	19,395	18,387
North Carolina	10,880	9,789	281	296	157	165	20,890	20,184
South Carolina	6,213	5,682	187	197	190	200	9,775	9,462
Virginia	8,686	8,286	544	572	122	128	21,604	21,943
West Virginia	2,549	2,381	236	248	189	199	7,535	7,659
Total	113,696	98,941	6,411	6,741	4,549	4,783	359,983	356,254
PAD District 2								
Illinois	13,344	13,744	791	842	195	208	31,020	32,521
Indiana	14,133	13,821	369	393	38	40	28,023	28,913
Iowa	6,800	6,525	450	479	40	43	15,957	16,212
Kansas	5,266	5,100	253	269	99	105	13,336	13,817
Kentucky	6,361	5,747	793	844	300	319	17,350	17,507
Michigan	6,803	8,181	340	362	236	251	22,691	22,819
Minnesota	6,753	6,341	402	428	38	40	20,428	20,880
Missouri	9,199	9,004	1,126	1,198	16	17	20,308	20,738
Nebraska	4,111	4,086	210	224	7	7	8,915	9,176
North Dakota	2,098	2,084	243	259	18	19	7,020	7,209
Ohio	17,659	17,092	3,085	3,283	1,950	2,075	39,232	40,250
Oklahoma	8,307	8,251	762	811	367	391	14,228	14,557
South Dakota	1,986	1,900	96	102	69	73	4,965	5,131
Tennessee	10,587	9,505	302	321	783	835	19,255	18,764
Wisconsin	7,711	7,072	433	461	42	45	20,282	20,537
Total	123,118	118,453	9,655	10,276	4,188	4,468	263,014	289,033
PAD District 3								
Alabama	7,450	6,758	734	703	638	611	16,550	15,436
Arkansas	5,820	5,512	916	877	103	99	13,764	13,336
Louisiana	7,880	7,510	2,672	2,559	219	210	32,094	30,858
Mississippi	5,626	5,257	724	693	747	715	12,465	11,849
New Mexico	4,020	3,512	511	489	74	71	8,571	7,954
Texas	32,407	32,692	7,503	7,184	1,727	1,653	92,368	90,180
Total	63,203	61,241	13,060	12,505	3,508	3,359	175,812	169,613
PAD District 4								
Colorado	4,597	4,211	628	595	110	104	9,717	9,132
Idaho	1,489	1,718	246	233	85	82	4,428	4,496
Montana	2,425	2,473	161	153	38	36	5,949	5,814
Utah	2,842	2,550	565	536	306	290	6,756	6,425
Wyoming	2,542	2,253	610	578	126	119	11,889	11,015
Total	13,795	13,205	2,210	2,095	645	611	36,730	36,884
PAD District 5								
Alaska	1,174	596	416	424	1,235	1,258	6,840	6,335
Arizona	4,816	4,581	271	276	232	236	8,201	8,102
California	28,804	27,679	2,971	3,026	2,893	2,947	67,897	67,337
Hawaii	515	415	151	154	428	436	4,762	4,570
Nevada	2,043	1,977	174	177	45	46	3,579	3,518
Oregon	5,469	5,339	337	343	559	569	14,977	15,020
Washington	5,733	5,579	1,081	1,101	909	926	18,122	18,200
Total	49,584	46,166	5,401	5,501	6,301	6,418	124,378	123,081
U.S. Total	382,278	338,006	36,737	37,118	19,201	19,639	961,927	974,864

Source: Energy Information Administration, Petroleum Supply Annual, June 1984.

THIS IS JUST ABOUT THE ONLY OIL ARCO DOESN'T CARRY.

ARCO doesn't have a line of salad oils. Yet. But they may be working on it. And why not.

They carry over 200 kinds of oil. Including their Polarvis™ Hydraulic Oil for use in extreme climates where regular oils won't do.

And that's just an appetizer.

They've also got a Professional Lube Sales Training School. Eight regional distribution centers. And field sales reps with a wealth of experience and technical back up.

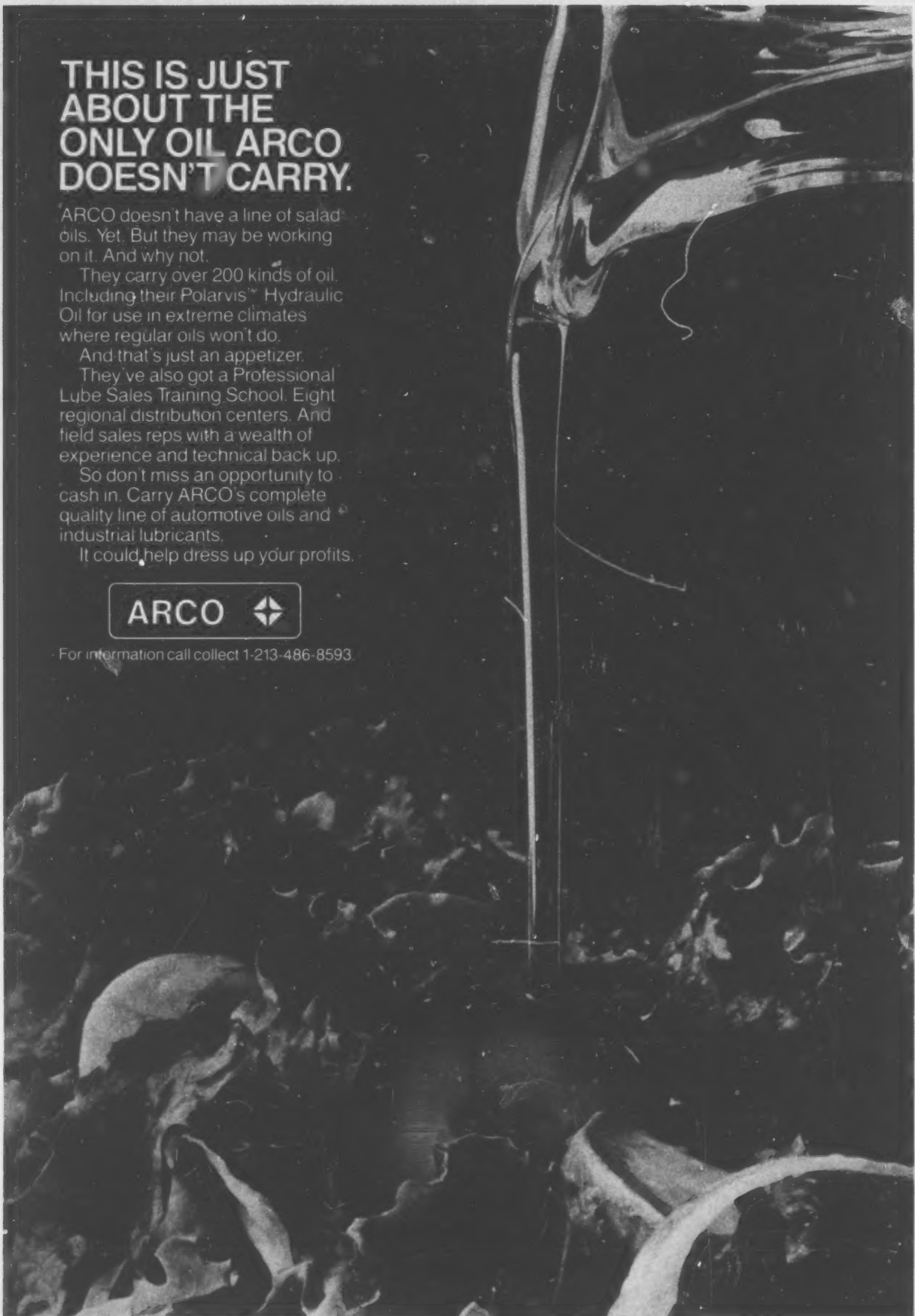
So don't miss an opportunity to cash in. Carry ARCO's complete quality line of automotive oils and industrial lubricants.

It could help dress up your profits.

ARCO



For information call collect 1-213-486-8593.



Kerosine Sales in 1983

(Add 000 bbl.)

Destination	Residential		Commercial		Industrial		Farm		All Other		Total	
	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1												
New England States												
Connecticut	239	263	1	1	2	2	0	0	105	115	347	381
Maine	247	272	20	22	4	4	3	4	13	14	287	316
Massachusetts	464	510	25	28	12	13	1	1	196	216	698	768
New Hampshire	213	234	7	8	0	0	1	1	5	5	226	248
Rhode Island	112	123	2	2	0	0	0	0	0	0	114	125
Vermont	140	154	24	26	0	0	4	5	2	2	170	187
Central Atlantic States												
Delaware	295	324	11	12	1	1	2	2	1	1	310	340
District of Columbia	4	4	1	1	1	1	0	0	0	0	6	6
Maryland	604	664	80	88	17	19	8	9	23	25	732	805
New Jersey	321	353	87	96	127	140	0	0	743	817	1,278	1,406
New York	1,670	1,836	181	199	119	131	21	23	338	372	2,329	2,561
Pennsylvania	1,995	2,194	214	236	301	331	23	25	133	146	2,665	2,932
Lower Atlantic States												
Florida	206	227	201	221	4	4	11	12	511	562	933	1,026
Georgia	56	62	130	143	2	2	11	12	85	94	284	313
North Carolina	1,841	2,025	30	33	33	36	159	175	57	63	2,120	2,332
South Carolina	478	526	23	25	10	11	13	14	26	29	550	605
Virginia	953	1,048	31	34	63	70	48	53	57	63	1,153	1,268
West Virginia	234	312	15	16	73	81	1	1	30	33	403	443
Total	10,122	11,131	1,083	1,191	799	846	308	337	2,325	2,557	14,605	16,082
PAD District 2												
Illinois	281	335	6	7	42	50	15	18	24	29	368	439
Indiana	288	343	15	18	100	119	51	61	42	50	496	591
Iowa	251	299	30	36	12	14	51	61	34	40	378	450
Kansas	15	15	6	7	21	25	6	7	142	169	190	226
Kentucky	442	527	70	83	100	119	40	47	305	364	957	1,140
Michigan	469	559	15	18	60	72	15	18	64	76	623	743
Minnesota	160	191	3	4	0	0	27	32	3	4	193	231
Missouri	103	123	490	584	9	11	33	40	18	22	653	780
Nebraska	24	29	12	14	12	14	27	32	3	4	78	93
North Dakota	18	22	3	4	0	0	0	0	0	0	21	26
Ohio	765	912	51	61	159	191	40	47	1,134	1,352	2,149	2,563
Oklahoma	12	14	203	242	42	50	15	18	115	137	387	461
South Dakota	18	22	9	11	0	0	3	4	0	0	30	37
Tennessee	454	541	112	133	12	14	0	0	345	411	923	1,099
Wisconsin	66	79	109	130	21	25	3	4	3	4	202	242
Total	3,366	4,014	1,134	1,352	590	704	326	369	2,232	2,662	7,648	9,124
PAD District 3												
Alabama	607	534	308	331	232	204	28	25	723	636	1,968	1,730
Arkansas	58	51	76	76	232	204	28	25	174	153	578	509
Louisiana	86	76	376	331	1,707	1,501	319	280	4,050	3,562	6,538	5,750
Mississippi	58	51	145	127	116	102	28	25	28	25	375	330
New Mexico	203	178	174	153	86	76	0	0	202	178	555	585
Texas	405	356	1,476	1,298	1,620	1,425	175	153	7,840	6,895	11,516	10,127
Total	1,417	1,246	2,633	2,316	3,993	3,512	578	508	13,017	11,449	21,638	19,031
PAD District 4												
Colorado	113	170	16	23	5	8	31	46	10	15	175	262
Idaho	0	0	5	8	10	15	0	0	5	8	20	31
Montana	0	0	0	0	0	0	0	0	0	0	0	0
Utah	31	46	31	46	16	23	0	0	51	77	129	192
Wyoming	0	0	10	15	5	8	0	0	78	116	93	139
Total	144	216	62	92	36	54	31	46	144	216	417	627
PAD District 5												
Alaska	0	0	23	24	1,176	1,220	0	0	17	18	1,216	1,262
Arizona	0	0	12	12	0	0	0	0	6	6	18	18
California	17	18	312	324	64	66	58	60	64	68	515	534
Hawaii	0	0	0	0	0	0	0	0	0	0	0	0
Nevada	12	12	6	6	0	0	0	0	0	0	18	18
Oregon	58	60	12	12	0	0	6	6	17	18	93	96
Washington	69	72	17	18	75	78	0	0	23	24	184	192
Total	156	182	382	398	1,315	1,364	64	66	127	132	2,044	2,121
U.S. Total	15,205	16,769	5,294	5,347	6,703	6,480	1,305	1,346	17,845	17,016	46,362	46,963

Source: Energy Information Administration, Petroleum Supply Annual, June 1984.

Precision Engineered for the Petroleum Industries

These Centrifugal Pumps are designed primarily for pumping petroleum products, related derivatives, petro-chemicals and solvents. In no way are they adaptations of pumps originally built for handling water or other non-petroleum liquids. Thus these models incorporate design features of paramount value for liquid hydrocarbon service.

All models are available both as straight centrifugals or in the exclusive Roto-Prime self-priming pump design in sizes 3" x 2", 4" x 3", 6" x 4" and 6" x 5".

With the Roto-Prime pump an integral variable-capacity vane pump automatically evacuates air and vapor. This principle is simple, dependable and time-proven around the globe.

All centrifugals have rugged cast iron or cast steel housings, heavy-duty SAE 1045 steel shafts, viton fitted mechanical shaft seals and balanced impellers with bronze wear rings.

Pumps are available without drivers, or with motors up to 100 h.p. Capacities range up to 1600 GPM; heads up to 400 feet. With the GRP 33-06 Air Release, pumping can be accomplished against normal back pressure. All accessories usually required can be supplied.

The finest in centrifugal pumps for petroleum service can be specified with a single word — "Gorman-Rupp". Include that word in **your** centrifugal pump specifications.



BUILT-IN
PRIMING PUMP
CHECK VALVE

SEALED END
BALL BEARINGS

MECHANICAL SEAL

VARIABLE DISPLACE-
MENT PRIMING PUMP

BALANCED IMPELLER

VOLUTE

SUCTION INLET



THE GORMAN-RUPP COMPANY

P. O. Box 1217, Mansfield, Ohio 44901

(419) 755-1011

GRP-178

Residual Fuel Oil Sales in 1983 . . .

(Add 000 bbl.)

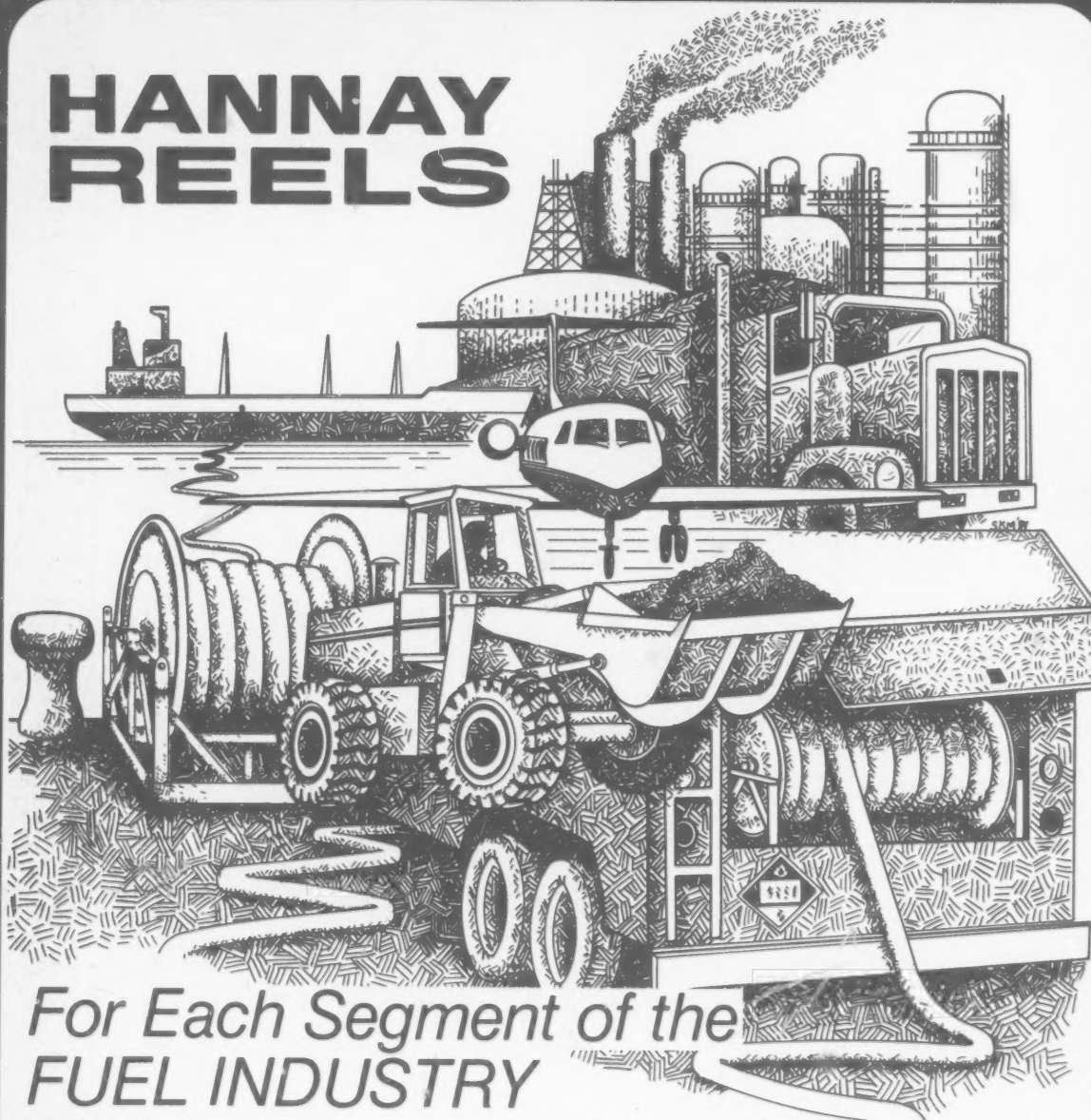
Destination	Commercial		Industrial		Oil Company		Electric Utility		Military	
	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1										
New England States										
Connecticut	575	790	2,243	3,082	28	39	19,351	17,282	0	0
Maine	484	665	8,325	11,440	0	0	3,298	3,034	22	32
Massachusetts	3,192	4,386	3,751	5,154	1	2	26,309	31,130	669	968
New Hampshire	473	650	445	611	0	0	2,625	2,815	1	2
Rhode Island	170	233	468	643	0	0	550	896	5	7
Vermont	87	119	184	253	0	0	0	0	0	0
Central Atlantic States										
Delaware	918	1,261	770	1,058	0	0	3,340	3,362	50	73
District of Columbia	83	114	1	1	0	0	2	0	948	1,371
Maryland	341	469	932	1,280	9	13	4,669	5,645	1,044	1,510
New Jersey	3,491	4,797	3,193	4,387	3,115	4,280	7,397	7,959	68	98
New York	14,178	19,482	7,530	10,347	82	112	54,248	56,114	493	714
Pennsylvania	835	1,148	4,077	5,602	1,953	2,546	15,543	9,458	7	10
Lower Atlantic States										
Florida	269	397	3,283	4,511	5	7	45,700	52,155	37	54
Georgia	4	5	2,244	3,083	12	16	1	57	62	90
North Carolina	140	192	4,021	5,525	2	3	0	0	22	32
South Carolina	20	28	1,517	2,085	3	4	0	6	32	46
Virginia	391	537	2,041	2,805	36	53	2,173	2,974	296	428
West Virginia	2	3	820	1,127	228	313	0	0	0	0
Total	25,673	35,276	45,845	62,094	5,377	7,388	185,208	192,867	3,758	5,435
PAD District 2										
Illinois	922	1,071	1,832	2,127	4,541	5,273	4,381	6,897	15	22
Indiana	79	92	1,455	1,689	2,622	3,045	0	0	0	0
Iowa	25	29	251	292	0	0	15	0	0	0
Kansas	3	3	418	486	233	271	106	233	0	0
Kentucky	4	4	609	707	410	476	0	0	7	10
Michigan	194	225	1,546	1,795	709	824	584	1,304	0	0
Minnesota	154	179	1,049	1,218	199	231	40	17	0	0
Missouri	28	32	233	271	267	310	203	123	79	115
Nebraska	90	105	80	93	0	0	0	0	0	0
North Dakota	186	216	259	301	269	312	0	0	225	325
Ohio	159	185	1,287	1,494	379	440	31	100	0	0
Oklahoma	0	0	36	44	502	583	0	0	0	0
South Dakota	11	13	26	32	0	0	0	0	0	0
Tennessee	91	106	502	583	21	24	0	0	0	0
Wisconsin	34	39	1,703	1,978	123	143	0	0	0	0
Total	1,980	2,299	11,290	13,110	10,275	11,932	5,380	8,874	326	472
PAD District 3										
Alabama	126	166	2,830	3,738	35	46	0	0	0	0
Arkansas	110	146	1,171	1,547	0	0	0	108	0	0
Louisiana	13,060	17,247	6,102	8,058	1,513	1,998	85	1,118	0	0
Mississippi	22	29	1,698	2,242	389	514	0	284	0	0
New Mexico	0	0	489	646	0	0	33	68	0	0
Texas	1,427	1,884	13,793	18,215	7,288	9,625	456	795	100	144
Total	14,745	19,472	26,063	34,446	9,225	12,183	579	2,373	100	144
PAD District 4										
Colorado	5	5	6	7	0	0	0	0	0	0
Idaho	16	18	186	205	0	0	0	0	0	0
Montana	5	5	272	300	1,222	1,349	0	0	0	0
Utah	35	39	305	337	441	487	0	0	0	0
Wyoming	165	182	301	332	999	1,102	0	0	0	0
Total	226	249	1,070	1,181	2,662	2,938	0	0	0	0
PAD District 5										
Alaska	1	3	0	0	0	0	336	298	0	0
Arizona	80	164	8	16	0	0	0	117	0	0
California	2,766	5,697	472	973	3,467	7,141	2,585	13,087	561	812
Hawaii	53	110	123	254	790	1,827	10,149	9,897	166	240
Nevada	5	11	11	22	0	0	23	86	0	0
Oregon	750	1,544	1,861	3,422	78	157	0	0	152	220
Washington	464	956	3,010	6,201	948	1,953	0	0	350	506
Total	4,119	8,486	5,385	10,889	5,281	10,878	13,083	23,486	1,229	1,778
U.S. Total	46,743	65,781	69,573	122,619	32,629	45,319	204,238	227,419	5,411	7,829

... By Categories and Uses

(Add 000 bbl.)

Destination	Railroad		Vessel Bunkering		All Other		Total	
	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1								
New England States								
Connecticut	0	0	5	6	109	150	22,311	21,349
Maine	7	10	533	620	1	2	12,670	15,803
Massachusetts	0	0	469	546	419	576	34,810	42,762
New Hampshire	0	0	24	28	0	0	3,568	4,106
Rhode Island	0	0	10	12	0	0	1,203	1,791
Vermont	0	0	0	0	0	0	271	372
Central Atlantic States								
Delaware	0	0	117	136	290	399	5,485	6,289
District of Columbia	0	0	0	0	30	41	1,064	1,527
Maryland	0	0	2,431	2,831	109	150	9,535	11,898
New Jersey	0	0	10,328	12,029	503	691	28,095	34,241
New York	0	0	2,744	3,196	79	108	79,354	90,073
Pennsylvania	0	0	1,438	1,675	255	350	24,008	20,789
Lower Atlantic States								
Florida	0	0	5,035	5,864	66	91	54,415	63,079
Georgia	0	0	1,984	2,311	0	0	4,307	5,562
North Carolina	0	0	186	217	1	2	4,372	5,971
South Carolina	3	4	680	792	0	0	2,255	2,965
Virginia	26	36	2,325	2,708	37	50	7,328	9,591
West Virginia	0	0	0	0	0	0	1,050	1,443
Total	36	50	28,309	32,971	1,899	2,610	296,101	330,612
PAD District 2								
Illinois	3	4	3	1	95	112	11,793	15,507
Indiana	0	0	72	27	3	3	4,231	4,856
Iowa	0	0	0	0	0	0	291	321
Kansas	0	0	0	0	0	0	760	993
Kentucky	0	0	0	0	0	0	1,030	1,197
Michigan	38	44	61	23	60	70	3,192	4,285
Minnesota	35	40	114	43	3	4	1,594	1,732
Missouri	0	0	5	2	3	3	818	856
Nebraska	0	0	0	0	0	0	170	198
North Dakota	0	0	0	0	15	17	954	1,171
Ohio	0	0	3	1	231	268	2,090	2,488
Oklahoma	0	0	0	0	63	73	603	700
South Dakota	0	0	0	0	5	6	44	51
Tennessee	17	20	5	2	11	13	647	748
Wisconsin	3	3	72	27	19	22	1,954	2,212
Total	96	111	335	126	509	591	30,171	37,315
PAD District 3								
Alabama	0	0	2,127	2,410	0	0	5,118	6,350
Arkansas	0	0	0	0	2	2	1,283	1,803
Louisiana	0	0	16,976	19,154	518	685	38,254	48,260
Mississippi	0	0	2,217	2,501	0	0	4,326	5,570
New Mexico	0	0	0	0	2	2	529	716
Texas	0	0	27,821	31,389	13	17	50,898	62,069
Total	0	0	49,141	55,444	538	706	100,408	124,768
PAD District 4								
Colorado	0	0	0	0	2	2	13	14
Idaho	0	0	0	0	0	0	202	223
Montana	0	0	0	0	13	14	1,512	1,668
Utah	0	0	0	0	21	23	802	886
Wyoming	8	9	0	0	8	9	1,481	1,634
Total	8	9	0	0	44	48	4,010	4,425
PAD District 5								
Alaska	0	0	0	0	0	0	337	301
Arizona	0	0	0	0	0	0	88	297
California	0	0	48,644	53,250	210	432	58,705	61,392
Hawaii	0	0	785	860	162	335	12,228	13,323
Nevada	0	0	0	0	0	0	39	119
Oregon	0	0	5,071	5,551	16	33	7,726	10,927
Washington	0	0	4,005	4,384	14	29	8,791	14,029
Total	0	0	58,505	64,045	402	829	87,914	120,368
U.S. Total	140	170	136,290	152,586	3,390	4,784	518,604	628,510

HANNAY REELS



For Each Segment of the **FUEL INDUSTRY**

- Fuel oil delivery
- Offshore crude loading and unloading
- Aircraft refueling and ground support services
- In-plant lubrication and refueling
- Fueling and lubrication of construction and mining vehicles

Wherever the energy industry uses hose to move fuel or other fluids, there's a need for Hannay Reels to direct the flow. With Hannay Reels, fuel handlers get the widest selection of hose reels, ranging from the giant 8' x 12' floater hose reel for

offshore crude loading and unloading, to reels for home heating oil delivery. Use Hannay Reels at airports and seaports . . . construction sites and mines . . . fleet depots and marinas . . . and in plants. Hannay hose reels facilitate refueling . . . lubrication . . . ground service . . . loading, unloading and delivery. And Hannay grounding cable reels protect against static build-up.

Hannay Reels . . . Meeting the highest industry demands for fast, safe, efficient hose and cable handling . . . Backed by over 50 years of experience and innovation.

**Buy Hannay Reels And
Wind Up With The Best.**



HANNAY REELS

CLIFFORD B. HANNAY & SON, INC., 600 EAST MAIN STREET
WESTERLO, NEW YORK 12193 • TELEPHONE (518) 797-3791

U.S. Sales of Distillate Fuel Oil By Uses

(Add 000 bbl.)

Year	Residential	Commercial	Industrial	Farm	Oil Company	Electric Utilities	Diesel	Other	Total
1983	171,783 (b)	72,809	69,332	66,697	29,957	11,744	362,276	197,328	981,927
1982	180,760 (b)	75,669 (b)	71,340 (c)	66,453 (c)	29,482 (c)	12,134	375,124 (e)	164,253 (f)	974,864
1981 (a)	197,400 (b)	78,663 (b)	80,216 (c)	69,665 (d)	29,185 (c)	18,192	378,853 (e)	180,302 (f)	1,032,476
1980 (a)	227,261 (b)	92,136 (b)	86,089 (c)	73,615 (d)	24,205 (c)	31,812	377,136 (e)	176,355 (f)	1,086,709
1979 (a)	270,306 (b)	99,723 (b)	99,583 (c)	84,926 (d)	22,043 (c)	46,579	392,614 (e)	198,600 (f)	1,214,374

(a) In 1979, DOE changed its sampling and reporting formulas. It eliminated the "heating oils" category and added a new farm category. The sum of the first four categories is roughly related to the old heating oil category but cannot be construed as comparable. (b) Primarily space and water heating; (c) Includes some space heating but primarily equipment fuel; (d) Includes space and water heating, crop drying, farm equipment, etc. (e) Includes 37,118,000 bbl. of off-highway diesel in 1982; (f) In 1982, consisted of 93,150 railroad, 33,885 vessel bunkering, 37,118 military and 19,639 miscellaneous. For similar data on 1981, 1980, and 1979, see the 1983 Factbook. The pre-1979 categories are as follows:

Year	Heating Oils	Industrial Use	Oil Company Use	Electric Utilities	Railroads	Vessel Bunkering	Military Use	Diesel Fuel	All Other	Total
1978	533,069	94,797	19,410	77,175	99,641	37,591	20,320	367,799	14,509	1,257,061
1977	538,845	96,502	19,954	76,681	99,306	33,512	20,121	330,864	14,394	1,230,179
1976	543,895	79,956	14,523	60,570	97,467	26,330	17,574	297,249	11,365	1,150,929
1975	488,368	63,993	13,633	63,420	93,191	26,136	18,004	266,903	10,096	1,043,746
1970	521,135	43,668	11,518	24,770	88,416	19,503	12,447	194,919	10,874	927,250

Source: Deliveries of fuel oil and kerosine in 1981, Petroleum Supply Annual, Department of Energy, June 1984.

U.S. Sales of Residual Fuel Oil By Uses

(Add 000 bbl.)

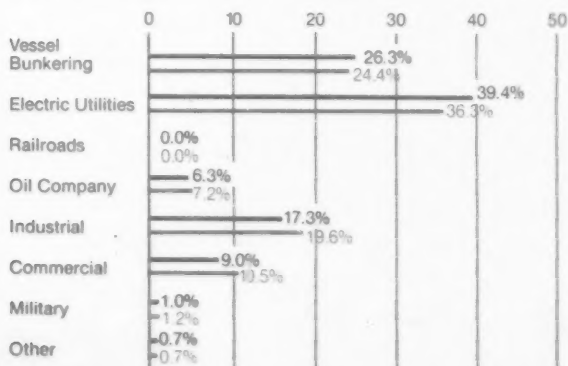
Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Companies	Industrial	Commercial	Military	Other	Total
1983	136,290	204,238	140	32,820	80,573	48,743	5,411	3,389	518,604
1982	152,586	227,419	170	45,319	122,619	65,781	7,829	4,784	626,510
1981 (a)	188,632	325,486	178	51,870	117,024	67,035	7,008	4,795	762,030
1980 (a)	213,131	390,105	665	59,519	163,564	98,034	8,066	4,382	937,466
1979 (a)	190,543	486,636	245	51,062	198,750	82,729	7,736	16,900	1,034,610

(a) In 1979, DOE changed its sampling and reporting formulas in such a way that none of the new data are directly comparable to the pre-1979 data, which follow. Also, in its 1981 update, DOE revised the totals for 1979 and 1980.

Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Company	Industrial Use	Heating Oils	Military Use	All Other	Total
1978	157,495	533,193	206	57,690	169,403	164,536	16,583	4,127	1,103,233
1977	128,966	569,429	329	60,582	171,967	168,279	16,640	4,729	1,129,927
1976	117,456	492,974	423	58,212	153,596	178,139	18,561	5,765	1,025,148
1975	96,673	454,935	583	50,487	116,675	154,103	19,066	6,066	898,572
1970	89,850	312,420	2,222	38,318	139,647	185,031	28,704	7,925	604,287

Sales of Residuals by Use as Percent of Total

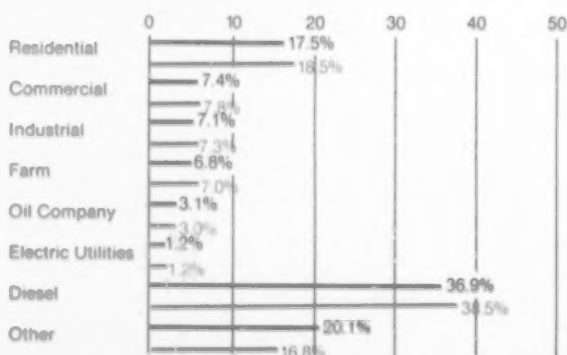
1983 = 518,604,000 bbl. 1982 = 626,510,000 bbl.



Source: Deliveries of Fuel Oil and Kerosine in 1983, Energy Information Administration, Petroleum Supply Annual, June 1984.

Sales of Distillates by Use as Percent of Total

1983 = 981,927,000 bbl. 1982 = 974,864,000 bbl.



Source: Deliveries of Fuel Oil and Kerosine in 1983, Energy Information Administration, Petroleum Supply Annual, June 1984.

Fuel Oil Dealer Population By States— 1982 vs. 1977

In the summer and fall of 1984, when the U.S. Census Bureau processed the data compiled in its 1982 Census of Retail Trade, it discovered that it could not provide the traditional population totals because some questions and answers had not been catalogued properly. Thus, the 1982 population profile is of the

establishments with payrolls only. It does not take into consideration the smaller family businesses which comprise about 10% to 15% of the retail fuel oil industry. The totals on this page, therefore, are not strictly comparable with the "universe" totals published in past *NPN Factbooks*.

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 (\$1,000)	% change 1977 to 1982	1982 (\$1,000)	% change 1977 to 1982	
United States	6,077	7,368	\$11,937,189	80.2	\$833,826	32.3	53,152
Alabama	7	12	6,602	94.4	330	-3.2	33
Alaska	39	45	91,459	(D)	8,650	(D)	270
Arizona	6	5	728	6.0	75	-32.7	7
Arkansas	7	10	12,755	267.2	467	14.8	39
California	24	31	19,362	169.2	1,267	72.1	113
Colorado	9	13	4,584	5.9	237	-41.6	23
Connecticut	365	408	803,357	102.7	63,272	51.9	3,489
Delaware	51	63	106,702	93.8	6,196	14.0	440
District of Columbia	10	10	75,995	(D)	4,957	(D)	280
Florida	130	158	106,472	69.4	8,462	21.2	839
Georgia	16	20	21,736	202.4	1,085	72.3	108
Hawaii	1	3	(D)	(D)	(D)	(D)	(D)
Idaho	12	23	4,991	-47.7	365	-50.1	56
Illinois	89	150	144,773	6.5	6,300	-45.5	398
Indiana	89	122	117,856	15.5	6,383	-14.7	492
Iowa	48	61	45,232	50.6	2,797	15.4	199
Kansas	20	23	14,873	95.2	1,015	25.8	88
Kentucky	31	33	22,223	116.5	1,332	62.8	117
Louisiana	9	15	8,586	88.5	566	22.8	48
Maine	201	235	357,388	71.3	21,679	24.4	1,702
Maryland	130	152	367,717	110.5	25,371	44.8	1,696
Massachusetts	778	870	1,324,084	87.1	100,356	39.2	6,353
Michigan	131	199	183,896	35.6	10,705	1.1	1,023
Minnesota	96	125	145,753	(D)	7,773	(D)	656
Mississippi	9	12	2,616	94.8	201	54.6	28
Missouri	41	57	31,658	37.5	1,567	-3	167
Montana	8	7	2,482	(D)	189	(D)	17
Nebraska	16	18	13,482	(D)	654	(D)	75
Nevada	7	7	16,038	106.4	1,476	53.3	76
New Hampshire	140	169	246,321	109.6	20,579	70.8	1,491
New Jersey	531	629	1,197,082	88.4	91,763	29.4	5,309
New Mexico	1	4	(D)	(D)	(D)	(D)	(D)
New York	997	1,272	2,833,396	78.0	206,540	34.3	11,007
North Carolina	259	336	250,688	40.5	15,605	9.3	1,327
North Dakota	32	28	36,346	183.3	1,729	84.7	143
Ohio	130	146	157,122	89.2	8,203	33.0	609
Oklahoma	17	19	4,578	51.8	385	40.0	38
Oregon	61	98	129,341	43.7	9,537	-5.1	658
Pennsylvania	599	659	1,410,330	88.3	92,224	36.9	6,276
Rhode Island	151	174	247,866	95.3	18,909	31.2	1,260
South Carolina	82	101	81,310	89.6	4,248	19.3	399
South Dakota	25	24	17,788	(D)	1,068	(D)	110
Tennessee	15	16	16,577	50.5	758	-7.0	79
Texas	50	61	68,509	84.2	3,323	5.7	244
Utah	11	6	31,283	(D)	1,256	(D)	97
Vermont	92	107	139,509	62.5	10,375	25.2	752
Virginia	211	250	505,425	127.3	32,560	47.8	2,433
Washington	118	195	215,233	75.7	17,716	19.4	937
West Virginia	14	13	16,719	167.3	868	5	70
Wisconsin	158	167	280,685	98.7	14,904	38.6	1,062
Wyoming	3	5	2,308	(D)	123	(D)	13

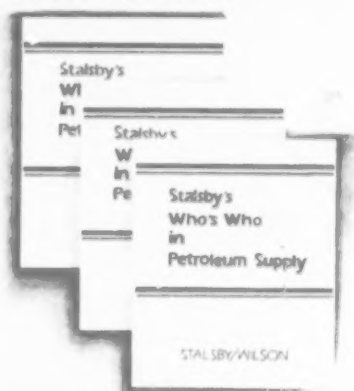
(D) Data withheld by Census Bureau to avoid disclosing data for individual companies.
Source: U.S. Census Bureau, 1982 Census of Retail Trade, published in 1984.

Stalsby's Books To Do Business By

For Oilmen Who Move Petroleum
Stalsby's Directories Are Not Just A Convenience,
They're A Necessity!

Stalsby's directories, the ***Who's Who In Petroleum Supply*** and now the ***NEW Petroleum Terminal Encyclopedia***, provide the logistics information required by marketers, traders, suppliers, retailers, schedulers, and planners.

Stalsby's Who's Who In Petroleum Supply has become the industry bible—the one source used by more marketing and supply personnel than any other publication. The Who's Who is a complete telephone directory of the people who market, supply and distribute crude oil, petroleum products, and gas liquids. It lists the names, titles, addresses, and telephone numbers of *over 850 companies, and 4800 oil personnel.*



The Most Cost Effective Marketing Tools You Can Buy.

The Who's Who is updated and published twice a year on easy to read 8½ x 11 pages. Subscriptions are just \$95.00 a year and include the NEW 3¾ x 6¾ Pocket Edition.

The Encyclopedia, published annually, is just \$125.00/year for each copy. Or, for your corporate requirements, receive five copies for \$500.00. (In Texas, please include 6% sales tax)

To get your copy of these indispensable tools, simply write to:

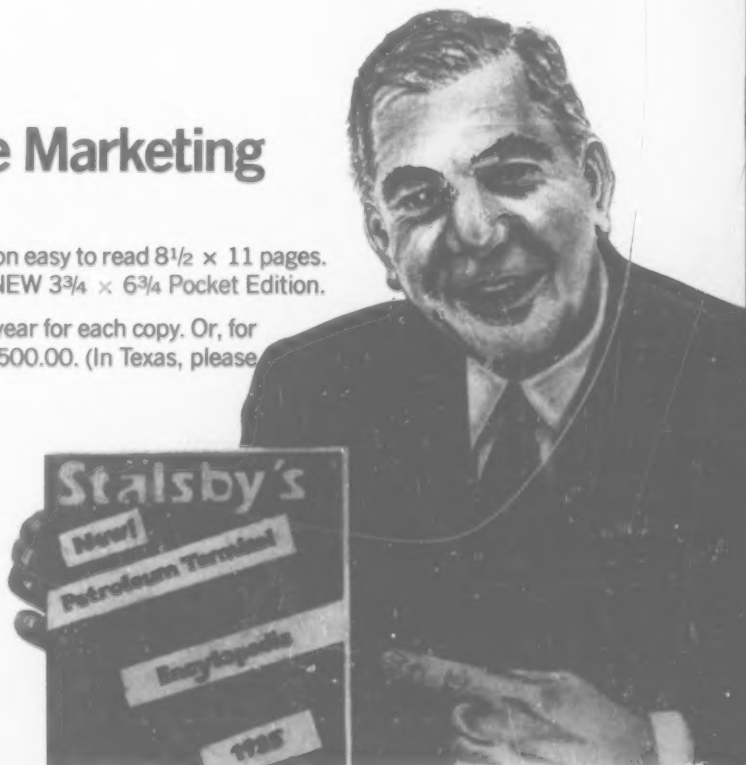
STALSBY/WILSON
Stalsby/Wilson Press
P.O. Box 19976
Houston, TX 77224
or, call (713) 496-1734.

NEW! For The First Time In A Single Source...

Stalsby's Petroleum Terminal Encyclopedia lists all the oil company terminals and independent terminal operators. This directory includes *1900 terminals* in the U.S. and Canada, as well as major ports in The Netherlands, Spain, the Bahamas, Japan, and Singapore.

Stalsby's Encyclopedia is indispensable. It includes terminal characteristics that affect methods of supply, distribution, marketing, shipping and delivery.

The Encyclopedia has all the information you need for planning the logistics of your next shipment, whatever the product, and whether you're shipping by pipeline, truck, rail, barge, or tanker.



Industry Profile—1984

Average Size of Business

	No. Residential Fuel Oil Accts.	No. C/I Customers	Vol. Distillate	Vol. Residual	Vol. Gasoline	No. Employees
New England	1,938	157	2,463,078 gal.	1,011,950 gal.	3,134,269 gal.	12.9
Mid-Atlantic	2,815	271	3,537,228	6,854,333	2,018,500	24.1
South	1,235	114	1,514,167	N.R.	3,014,286	12.9
Midwest	501	101	1,575,380	663,072	1,946,242	10.6
West	1,756	265	2,216,667	281,250	2,880,834	9.0
All Sections	1,649	181	2,261,304	2,118,121	2,596,826	13.9

N/R—Not Reported

Petroleum Products Sold (% of Total Volume)

	No. 2	No. 1	No. 4	No. 5 & 6
New England	85.2%	3.2%	0.2%	0.1%
Mid-Atlantic	75.1	6.4	0.4	2.3
South	34.8	9.5	*	*
Midwest	35.0	5.8	*	0.5
West	50.9	6.3	1.4	1.7
All Sections	56.2%	6.2%	0.4%	0.9%

	No. 2 for Diesel	Gasoline	LPG/LNG	Other
New England	4.5%	6.4%	2.0%	4.4%
Mid-Atlantic	7.6	15.4	1.1	0.2
South	22.5	34.1	*	*
Midwest	15.6	38.1	3.9	1.0
West	19.8	18.3	*	1.7
All Sections	14.0%	22.5%	1.4%	1.5%

*Less than .1%

Percent of Dealers Selling, Installing and Servicing Equipment

Residential					
	Oil Burners	Gas Burners	Domestic Hot Water	Boilers	Hydronic Systems
New England	93.8%	23.1%	96.9%	84.6%	61.5%
Mid-Atlantic	94.5	32.7	83.6	70.9	52.7
South	26.7	6.7	*	13.3	6.7
Midwest	80.0	53.3	33.3	40.0	26.7
West	66.7	16.7	33.3	50.0	16.7
All Sections	72.3%	26.5%	49.4%	51.8%	32.9%

Commercial/Industrial					
	Oil Burners	Gas Burners	Domestic Hot Water	Boilers	Hydronic Systems
New England	66.2%	12.3%	50.8%	44.6%	29.3%
Mid-Atlantic	69.1	20.0	56.4	52.7	34.5
South	20.0	6.7	6.7	6.7	*
Midwest	40.0	26.7	13.3	26.7	6.7
West	44.4	5.6	27.8	33.3	16.7
All Sections	47.9%	14.3%	31.0%	32.8%	17.4%

*Less than .1%

The Service Department—A Bird's Eye View

	Have Service Depts.	Average No. Calls per Year	Value of Parts/Inventory	Service Dept. Profitable	No. of Technicians
New England	82.7%	1,090	\$22,129	40.3%	4.2
Mid-Atlantic	77.5	3,109	24,329	43.6	5.3
South	36.3	275	25,875	25.0	0.8
Midwest	30.0	373	15,780	75.0	1.7
West	61.1	1,720	11,143	72.7	2.8
All Sections	57.5%	1,313	\$19,851	51.3%	3.0

Source: Fuel Oil News, a Hunter Publication, December 1984.

Annual Sales by Types of Customers

	Private Homes	Apts.	Schls.	Hospitals	Commercial	Industrial
New England.....	86.0%	4.4%	1.0%	0.2%	6.7%	1.6%
Mid-Atlantic.....	81.1	4.6	0.1	0.7	10.2	3.2
South.....	63.1	3.0	0.4	0.4	16.3	12.8
Midwest.....	70.0	2.5	1.6	0.9	15.3	4.5
West.....	76.4	3.7	2.4	0.4	9.9	10.7
All Sections.....	75.3%	3.5%	1.7%	0.5%	11.7%	6.6%

Electronic Data Processing (% Using)

	Use EDP	Use Computers in Office	# Units (Terminals, PCs, etc.)
New England.....	41.3%	41.3%	2.3
Mid-Atlantic.....	60.9	56.5	2.3
South.....	60.0	60.0	1.3
Midwest.....	38.5	38.5	1.4
West.....	61.1	50.0	0.4
All Sections.....	52.4%	49.3%	1.5

EDP Applications (by %)

	New England	Mid-Atlantic	South	Midwest	West	All Sections
General ledger.....	58.1%	59.5%	66.7%	75.0%	77.6%	67.4%
Accounts payable.....	45.2	54.8	77.8	70.0	77.6	65.1
Accounts receivable/billing.....	93.5	100.0	100.0	100.0	100.0	98.7
Inventory reconciliation.....	35.5	40.4	55.6	55.0	100.0	57.3
Payroll.....	38.7	50.0	44.4	70.1	77.6	56.2
Fixed asset management.....	12.9	21.4	33.3	15.0	44.4	25.4
Excise tax reporting.....	22.6	23.8	33.3	30.1	100.0	41.9
Communications with stations.....	6.5	4.8	*	5.0	*	3.3
Tracking supplier costs.....	9.7	9.5	33.3	5.1	*	11.5
Pricing analysis.....	12.9	9.5	22.2	5.0	22.2	14.4
Word processing.....	45.2	26.2	44.4	15.0	55.6	37.3
Scheduling of deliveries.....	74.2	54.8	44.4	15.9	44.4	47.6

*Less than .1%

Trucks per Marketer

	Average No. Del. Trucks	Average No. Trailers	Average Size		Optimum Size Preferred
			Largest	Smallest	
New England.....	4.5	0.5	2,855	2,163	2,928
Mid-Atlantic.....	5.2	0.7	3,198	2,149	2,970
South.....	4.0	1.3	2,282	1,723	2,320
Midwest.....	3.0	0.6	2,246	1,716	2,310
West.....	4.9	0.7	2,730	1,711	2,843
All Sections.....	4.3	0.8	2,662	1,892	2,674

Truck Tanks by Type

	Use			Prefer	
	Steel	Alum.	Both	Steel	Alum.
New England.....	67.1%	7.1%	25.7%	31.4%	48.6%
Mid-Atlantic.....	36.8	14.7	48.5	23.5	57.4
South.....	46.7	6.7	46.7	13.3	40.7
Midwest.....	64.2	7.5	18.9	35.8	28.3
West.....	33.3	11.1	50.0	5.6	77.8
All Sections.....	49.0%	8.4%	38.0%	21.9%	51.8%

Average Drop (Gal.)

	275-Gal. Tanks
New England.....	172.4
Mid-Atlantic.....	169.9
South.....	162.5
Midwest.....	187.0
West.....	171.6
All Sections.....	172.7

	550-Gal. Tanks
New England.....	360.8
Mid-Atlantic.....	354.0
South.....	385.8
Midwest.....	403.6
West.....	355.0
All Sections.....	371.8

% Selling, Installing & Servicing Equipment

New England.....	86.7%
Mid-Atlantic.....	77.5
South.....	26.7
Midwest.....	26.8
West.....	55.5
All Sections.....	54.6%

By Types of Equipment

	Residential	
	Furnaces	Warm Air Systems
New England.....	92.3%	83.1%
Mid-Atlantic.....	92.7	61.8
South.....	13.3	6.7
Midwest.....	80.0	53.3
West.....	66.7	50.0
All Sections.....	69.0%	51.0%

	Central A/C	Heat Pump
New England.....	18.5%	9.2%
Mid-Atlantic.....	43.6	23.6
South.....	13.3	*
Midwest.....	40.0	13.3
West.....	11.1	22.2
All Sections.....	25.3%	13.7%

	Commercial	
	Furnaces	Warm Air Systems
New England.....	58.5%	46.2%
Mid-Atlantic.....	56.4	38.2
South.....	13.3	*
Midwest.....	33.3	20.0
West.....	44.4	22.2
All Sections.....	41.2%	25.3%

	Central A/C	Heat Pump
New England.....	13.8%	3.1%
Mid-Atlantic.....	25.5	12.7
South.....	6.7	*
Midwest.....	20.0	13.3
West.....	5.6	5.6
All Sections.....	14.3%	8.9%

*Less than .1%

HANNA CAR WASH ALTERNATIVES

- Increase Gallonage ■ Diversify Income ■ Increase Profits
- Minimum Investment ■ Minimum Space

HANNA ROBOT WASH



Extra Services/Extra Income

- Polish 'n Wax Option
- Double Pass Option
- Air Drying Option
- Higher, Wider Clearances
- Hanna Shammy Material

Fully Automatic

- Coin or Token Function Control
- Drive in/Drive out or Drive in/Back out format

Minimum Resources

- Low Energy
- Partial or Full Reclaim

Designed-in Dependability

- Strong, Galvanized Steel Frame

Solid State Controls

- Elevated track for cold climates

Competitive Prices

CONVEYORIZED SYSTEM 3, MODEL 90 FOR IN-BAY AND SMALL LOTS



Increase volume up to 90 cars per hour with a Hanna conveyorized system on sites only 105 feet long.

- Fits in most bays.
- Includes wrap around washers, wheel washer, tire washer, conveyor and dryer.
- Equipment is pre-wired and pre-plumbed.
- Hanna offers car wash buildings that provide required structural components at minimum cost. Local materials can be used to adapt exterior to local environment.



FOR INFORMATION ON THE HANNA
WASH ROBOT AND CONVEYORIZED
SYSTEMS, MAIL THIS COUPON OR
CALL TOLL FREE 800/547-7910.

HANNA
Car Wash Systems

Hanna Drive
Portland, Oregon 97222

Name _____

Business Name _____

Address _____

City _____

State _____

Zip _____

Phone _____

World Oil Production by Area

(Add 000 bbl.)

Year	United States	Canada	Latin American	Western Europe	Middle East	Africa	Asia-Pacific	Total Free World	Communist Nations	Total World
1983	3,159,440	529,250	2,213,360	1,236,620	4,215,385	1,609,650	1,024,555	13,988,260	5,286,295	19,274,555
1982	3,156,715	452,965	2,255,355	1,085,145	4,581,480	1,622,790	961,410	14,116,160	5,278,995	19,395,155
1981	3,128,780	469,025	2,179,415	955,570	5,749,480	1,672,065	1,027,110	15,181,445	5,192,125	20,373,570
1980	3,146,502	521,184	2,036,058	883,406	6,735,498	2,226,378	1,000,278	16,559,304	5,206,350	21,765,654
1979	3,114,545	546,040	1,919,535	828,550	7,868,670	2,423,600	1,051,200	17,752,140	5,118,030	22,870,170
1978	3,175,927	483,260	1,736,427	643,149	7,884,927	2,233,791	1,037,520	17,195,001	4,963,250	22,158,251
1977	3,009,265	482,021	1,647,362	489,328	8,186,851	2,276,007	1,017,244	17,108,078	4,792,617	21,900,695
1976	2,976,180	488,680	1,625,069	311,858	8,115,708	2,134,861	922,818	16,575,174	4,616,366	21,191,540

Source: American Petroleum Institute Data Book, January 1985

World Crude Oil Reserves by Area

(Add 000 bbl.)

Year (a)	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1984	27,735,000	6,730,000	81,675,900	370,100,800	56,970,000	18,969,400	23,019,940	585,137,600	84,600,000	669,737,600
1983	29,785,000	7,020,000	74,482,066	369,285,893	57,821,690	19,756,077	22,923,680	583,147,406	85,115,000	668,262,406
1982	29,426,000	7,300,000	84,982,270	362,839,950	56,171,630	19,150,800	24,634,500	584,505,150	85,845,000	670,350,150
1981	29,805,000	6,400,000	69,489,837	362,071,000	55,148,375	19,630,500	23,085,000	565,629,712	86,300,000	651,929,712
1980	27,051,289	6,800,000	56,472,500	361,947,300	57,072,100	19,355,200	23,476,400	522,174,789	90,000,000	642,174,789
1979	27,803,760	6,860,000	41,246,500	369,996,000	57,892,125	20,007,200	23,966,000	547,771,585	94,000,000	641,771,585
1978	29,486,402	5,970,872	40,370,000	366,166,000	59,200,150	19,749,270	26,862,500	547,605,194	98,000,000	645,605,194
1977	30,942,166	6,257,082	29,608,950	367,681,220	60,570,200	19,391,140	24,538,810	538,989,568	101,100,000	640,089,568

(a) As of Jan. 1 of each year.

Source: American Petroleum Institute Data Book, January 1985

World Crude Oil Refining Capacity by Area

(barrels per day)

Year	United States	Other Western Hemisphere	Total Western Hemisphere	Middle East	Africa	Asia-Pacific	Europe	Total Free World	Sino-Soviet Bloc	Total World
1984	16,137,141	9,590,962	25,520,962	3,901,082	1,879,990	10,473,079	16,231,932	58,114,186	17,200,000	75,314,186
1983	16,859,337	9,873,816	26,773,153	3,685,333	1,822,105	10,902,204	17,124,989	60,327,784	16,873,000	77,200,784
1982	17,889,734	10,720,055	28,609,789	3,312,152	1,761,870	10,966,825	19,444,519	64,095,155	16,533,000	80,628,155
1981	18,620,520	10,716,881	29,337,401	3,729,646	1,697,658	10,554,691	20,205,799	65,524,895	16,036,500	81,561,395
1980	17,988,121	10,683,671	28,671,792	3,518,080	1,666,108	10,386,375	20,243,747	64,486,102	15,346,000	79,832,102
1979	17,440,885	10,273,030	27,713,915	3,546,029	1,667,608	10,284,966	20,328,614	63,541,132	14,748,000	78,289,132
1978	17,047,724	10,592,020	27,352,020	3,506,484	1,467,157	10,176,813	20,728,204	63,352,984	13,938,000	77,290,984
1977	16,398,372	10,015,186	26,413,558	3,347,855	1,444,400	10,047,965	20,859,376	62,113,154	13,067,810	75,180,964

Source: American Petroleum Institute Data Book, January 1985

World Natural Gas Production by Area

(Add 000,000 cubic feet)

Year	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1983	16,599,000	2,414,100	3,340,500	1,633,000	1,143,800	2,187,700	6,383,400	33,701,500	21,383,000	55,084,500
1982	18,519,675	2,546,100	3,051,500	1,799,700	1,168,900	2,176,600	6,142,100	35,424,575	20,258,000	55,682,575
1981	19,955,823	2,623,000	3,227,000	1,542,000	1,947,000	2,765,000	6,906,000	39,187,701	19,210,000	58,397,701
1980	20,179,724	2,668,300	3,297,500	1,221,300	884,700	2,558,400	6,668,700	37,677,687	21,069,900	58,747,587
1979	20,471,260	3,646,500	2,610,000	1,624,700	1,027,900	1,827,900	6,866,800	38,075,060	19,591,400	57,666,460
1978	19,974,033	3,128,056	2,012,912	1,579,478	1,117,416	1,469,154	6,649,855	35,930,904	15,818,398	51,749,302
1977	20,025,463	3,230,672	1,865,734	1,506,982	919,464	1,329,016	6,502,502	35,379,833	14,720,257	50,100,090
1976	19,952,438	3,067,353	1,722,106	1,492,772	905,792	1,173,878	6,343,593	34,657,932	14,801,281	49,459,213

Source: American Petroleum Institute Data Book, January 1985

Crude Oil Reserves in 20 Leading Nations

Nation	Reserves (Add 000 bbl.)		% of Free World Reserves		% of Total World Reserves	
	1984	1983	1984	1983	1984	1983
Saudi Arabia (a)	166,000,000	162,400,000	28.4%	27.8%	24.8%	24.3%
Kuwait (a)	63,900,000	64,230,000	10.9	11.0	9.5	9.6
U.S.S.R.	63,000,000	63,000,000	—	—	9.4	9.4
Iran	51,000,000	55,308,000	8.7	9.5	7.6	8.3
Mexico	48,000,000	48,300,000	8.2	8.3	7.2	7.2
Iraq	43,000,000	41,000,000	7.3	7.0	6.4	6.1
Abu Dhabi	30,400,000	30,510,000	5.2	5.2	4.5	4.6
United States	27,735,000	27,858,000	4.7	4.8	4.1	4.2
Venezuela	24,850,000	21,500,000	4.2	3.7	3.7	3.2
Libya	21,270,000	21,500,000	3.6	3.7	3.2	3.2
China	19,100,000	19,485,000	3.3	3.3	2.9	2.9
Nigeria	16,550,000	16,750,000	2.8	2.9	2.5	2.5
United Kingdom	13,150,000	13,900,000	2.2	2.4	2.0	2.1
Algeria	9,220,000	9,440,000	1.6	1.6	1.4	1.4
Indonesia	9,100,000	9,550,000	1.6	1.6	1.4	1.4
Norway	7,680,000	6,800,000	1.3	1.2	1.1	1.0
Canada	6,730,000	7,020,000	1.2	1.2	1.0	1.1
India	3,485,000	(b)	0.6	—	0.5	—
Egypt	3,450,000	3,325,000	0.6	0.6	0.5	0.5
Qatar	3,330,000	3,425,000	0.6	0.6	0.5	0.5
Total Free World	585,137,800	583,147,406	—	—	87.4%	87.3%
Total World	689,737,000	668,262,406	—	—	—	—

(a) Saudi Arabia and Kuwait share equally the production from the Neutral Zone which had reserves of 5,695,000,000 bbl. in 1984.

(b) Not ranked in top 20 in 1983.

Source: American Petroleum Institute, Basic Data Book, January 1985.

Crude Production in 20 Leading Nations

Nation	Production (Add 000 bbl.)				% of Free World Production		% of Total World Production	
	1983		1982					
	Total	b/d	Total	b/d	1983	1982	1983	1982
U.S.S.R.	4,363,900	11,956	4,368,760	12,024	—	—	22.6%	22.6%
United States (a)	3,170,999	8,688	3,156,715	8,649	22.7%	22.4%	16.5	16.3
Saudi Arabia (b)	1,776,455	4,867	2,304,975	6,315	12.7	16.3	9.2	11.9
Mexico	979,660	2,584	1,086,970	2,978	7.0	7.7	5.1	5.6
Iran	909,580	2,492	808,110	2,214	6.5	5.7	4.7	4.2
United Kingdom	839,135	2,299	772,705	2,117	6.0	5.5	4.4	4.0
China	789,005	2,107	740,585	2,029	5.5	5.2	4.0	3.8
Venezuela	653,350	1,790	690,215	1,891	4.5	4.9	3.4	3.6
Canada	529,250	1,450	452,695	1,241	3.8	3.2	2.7	2.3
Indonesia	505,525	1,385	488,735	1,339	3.6	3.5	2.6	2.5
Nigeria	429,965	1,178	472,675	1,295	3.1	3.3	2.2	2.4
United Arab Emirates	408,070	1,118	443,110	1,214	2.9	3.1	2.1	2.3
Libya	382,740	1,076	422,670	1,158	2.8	3.0	2.0	2.2
Iraq	336,530	922	354,780	972	2.4	2.5	1.7	1.8
Kuwait (b)	321,585	881	244,915	671	2.3	1.7	1.7	1.3
Algeria	255,135	699	259,150	710	1.8	1.8	1.3	1.3
Egypt	251,485	700	242,725	665	1.8	1.7	1.3	1.3
Norway	224,110	614	189,070	518	1.6	1.3	1.2	1.0
Brunei-Malaysia	190,885	523	167,900	460	1.4	1.2	1.0	0.9
Argentina	174,835	479	176,660	484	1.2	1.3	0.9	0.9
Total Free World	13,988,260	38,324	14,116,160	38,674	—	—	72.6%	72.8%
Total World	19,274,555	52,807	19,395,155	53,137	—	—	—	—

(a) Includes lease condensate.

(b) Excludes Neutral Zone Production.

Source: American Petroleum Institute, Basic Data Book, January 1985.

World Oil Demand To Rise Slowly

A long range projection by Conoco Inc. anticipates that world oil demand will grow at a rate of 1% per year through the year 2000. In barrels per day, it is expected to rise from 46-million in 1984 to 54-million in 2000.

Conoco noted that while oil demand has been stimulated by the 20% decline in crude oil prices since 1981, the price shocks of the last decade are continuing to restrain overall growth.

The long-range projection, updated last spring, offered these terse commentaries:

Growth will be slower in the developed world, where many non-oil energy projects such as coal, nuclear power plants and gas pipelines are currently underway. High-cost alternatives to oil are less prevalent in the Third World due to the large external debts of many developing countries. Nonetheless, even in the Third World, oil will constitute a declining share of energy use as every effort is made to conserve foreign exchange and exploit domestically produced alternatives.

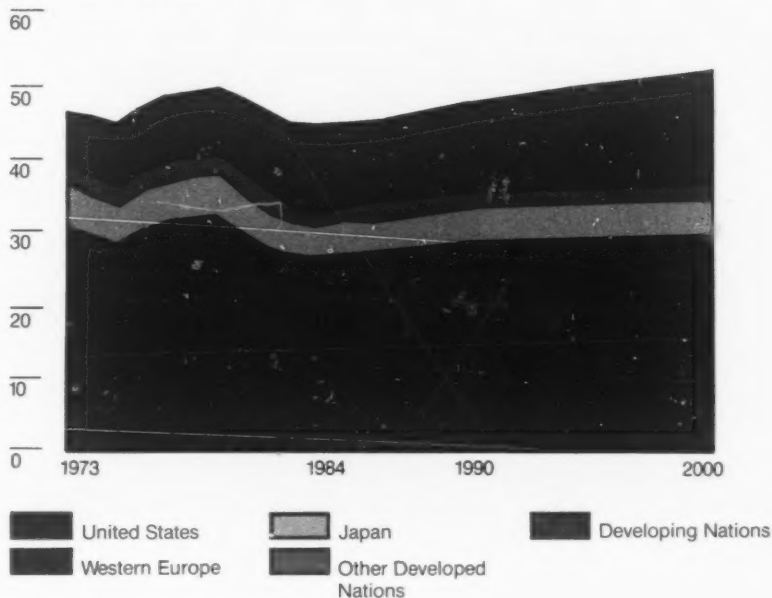
Gasoline consumption will grow slowly but decline as a share of the product barrel due primarily to improvement of the fuel efficiency of the U.S. vehicle fleet. Growth in middle distillate demand will be relatively robust as expanded use of kerosine jet and diesel fuel offsets slow growth in consumption of heating oil, which will face generally stiff competition from gas and electricity in North America and Western Europe.

Residual fuel oil demand will be fairly stable until 2000. Given the oil price outlook, very few additional conversions out of fuel oil in the power and industrial sectors will go forward.

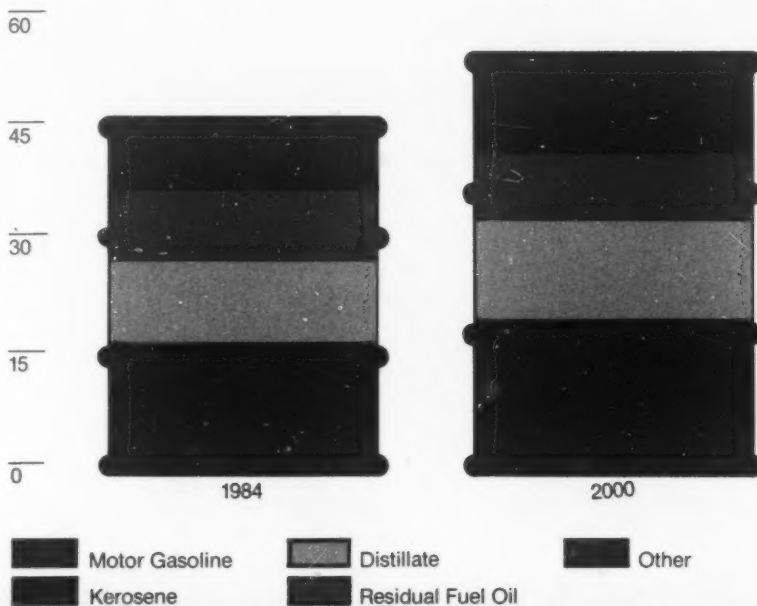
Lower crude oil price prospects have seriously discouraged exploration and development efforts in non-OPEC countries. This will lead to slowly declining total non-OPEC supplies in the 1990s.

Slowly rising demand and peaking non-OPEC supplies imply increasing reliance on OPEC oil in the years ahead. This trend is not readily apparent because more than a third of OPEC's production capacity stands idle and the predominant near-term price pressures are downward. But, by the early 1990s most of OPEC's remaining excess capacity will be concentrated in countries such as Saudi Arabia with the least-pressing revenue needs. Simultaneously, OPEC's production will become increasingly concentrated in the Middle East, where the bulk of its reserves remain, but where the potential for supply interruptions is also higher. OPEC will also realize rapidly rising oil export revenues in the 1990s. Altogether, these factors will restore OPEC to a much more powerful position in world oil markets.

Regional World Oil Demand
(Million Barrels Per Day)



World Oil Product Demand
(Million Barrels Per Day)



ANCO.

The best blade you can sell.

Tests prove it.

ANCO is the number one brand in the wiper blade business. Because, quite simply, we build the best wiper blades money can buy.

That's why in a recent wiper blade test, certified by USAC, we came out on top. ANCO had the best overall rating (averaging 8 out of a possible 10 points) of all major wiper brands, cleaning windshields better than any other blade tested.

But ANCO blades not only clean better, they sell better. Which gives customers like you a real advantage in the market place.

Our products are not the only thing that are superior to the competition. So are our

support programs. No one else has an exciting national television campaign like our Laurel & Hardy series. No one else offers a successful, consumer-oriented rebate program year after year. And no one else supplies you with dynamic merchandising and point-of-purchase materials like ours.

Put that all together and you've got the best-made, best-known and best-selling wiper blade in the business, ANCO.

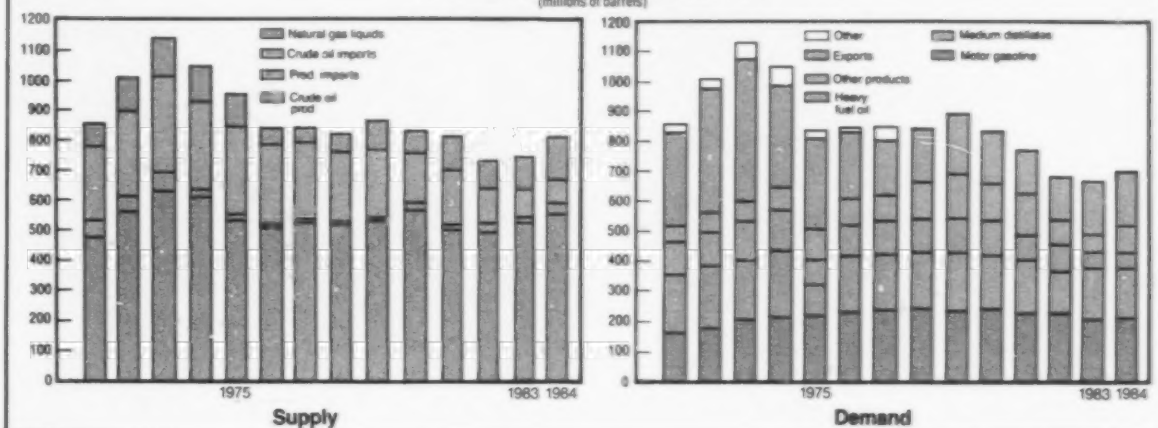
For more information, contact your ANCO supplier. You'll discover that ANCO is the best blade you can sell.



ANCO.
©1985 Champion Spark Plug Company

*Laurel and Hardy 1965. Larry Harmon Pictures Corporation

Petroleum Supply-Demand in Canada
(millions of barrels)



Refined Product Sales in 1984

	(Cubic Meters*)							
	Aviation Gas	Motor Gas	Aviation Turbine	Kerosene	Diesel	Light Fuel	Heavy Fuel	Lubes & Greases
Newfoundland	4,472	550,510	239,380	48,386	454,700	292,199	400,605	12,448
Prince Edward Island	2,658	169,196	6,883	13,894	56,319	118,669	8,932	2,029
Nova Scotia	2,362	1,123,365	149,995	69,550	624,534	799,635	753,172	29,809
New Brunswick	2,752	905,127	47,471	40,143	372,337	463,109	1,169,250	22,634
Quebec	25,627	6,758,338	816,023	200,929	2,394,131	2,864,643	2,766,395	157,336
Ontario	42,270	11,788,403	1,314,305	142,018	3,827,699	2,566,149	1,283,614	441,668
Manitoba	21,612	1,479,841	172,176	70,962	797,164	69,242	83,218	32,843
Saskatchewan	11,859	1,873,602	82,886	104,715	1,125,888	120,781	36,269	45,693
Alberta	22,673	4,437,321	736,812	47,089	2,663,403	76,768	30,410	97,043
British Columbia	28,006	3,728,469	500,802	65,926	2,180,189	470,618	674,661	85,737
Yukon	3,852	51,123	4,201	12,815	50,998	23,195	0	1,065
Northwest Terr.	9,269	49,521	72,592	54,623	235,630	56,672	20,314	3,438
Total 1984	177,412	32,914,816	4,143,526	871,049	14,782,992	7,921,680	7,226,840	931,743
Total revised 1983	179,479	33,186,570	3,905,449	870,450	13,924,353	8,520,529	8,016,836	885,850

*Note: (cubic meters) $\times$ 6.2896 = barrels; also 1 barrel equals 42 U.S. gal.
Source: Statistics Canada

Gasoline Outlets

Province	Outlets
Newfoundland	—
Prince Edward Island	194
Nova Scotia	1,525
New Brunswick	1,394
Quebec	—
Ontario	7,764
Manitoba	2,641
Saskatchewan	—
Alberta	10,933
British Columbia	9,739
Yukon	61
Northwest Territories	—

Source: Statistics Canada

Premium Ratios

Province	Premium *	
	Dec. '83	Dec. '84
Alberta/Northwest Territories	6.1%	5.4%
British Columbia/Yukon	9.3	9.3
Manitoba	3.7	3.5
Maritimes	8.8	9.2
Newfoundland	5.9	5.0
Ontario	11.4	11.4
Quebec	15.7	17.1
Saskatchewan	3.5	3.3
Total Canada	10.5	10.6

*Contains leaded and unleaded premium.
Source: Ethyl Corp., Chemicals Group

Canadian Oil Companies:

BRANDED SERVICE STATIONS

Company	Total branded retail outlets	Number of Provinces where marketed	Supplied directly	Supplied through jobbers & commission agents	Lessee/Dealer operated	Salary operated	Commission operated	Full-serve only	Self-serve only
Chevron Canada Ltd. (A)	—	1	—	—	—	—	—	—	—
Esso Petroleum Canada	3,431	10	2,231	1,200	2,896	76	459	2,785	646
Federated Co-Op. Ltd.	505	4	505	0	501	4	0	275	230
Gulf Canada Ltd. (C)	2,487	10	—	—	2,335	152	0	2,022	461
Husky Oil Ltd.	317	5	317	—	317	—	—	223	91
Irving Oil Ltd. (x)	—	—	—	—	—	—	—	—	—
Loeb Inc. (B)	95	2	95	—	37	12	46	95	—
Mohawk Oil Co. Ltd.	354	5	276	78	216	115	27	221	127
Petro-Canada Prod. Inc.	2,497	10	2,324	173	2,017	50	430	1,892	601
Shell Canada Ltd. (C)	3,433	10	2,274	1,159	2,826	153	454	2,863	570
Spur Oil Ltd. (C)	—	—	—	—	—	—	—	—	—
(Div. of Murphy Oil Co. Ltd.)	141	2	141	0	97	0	0	128	13
Sunys Petroleum Inc.	195	2	195	—	74	9	112	155	40
Sunoco Inc.	829	3	715	114	524	—	—	570	256
Texaco Canada	2,261	10	—	—	—	—	—	1,698	563
Turbo Resources Ltd.	214	6	200	14	57	—	157	204	10
Ultramar Canada Inc.	865	3	865	—	391	—	—	—	—

(x) Did not respond.

(A) Would not provide figures.

(B) Formerly Top Valu Gasmarts.

(C) Did not respond—figures are for year-end 1983.

Brand Names of Gasoline and Motor Oils

Gasoline	Motor Oil	Gasoline	Motor Oil	Gasoline	Motor Oil
Chevron Canada Ltd.		Petro-Canada Products Inc.		Convenience Div./Loeb Inc. (formerly Top Valu Gasmarts)	
Chevron (r,ur)	Chevron	Petro-Canada (r,ur,p,d)	Heavy Duty	Top Valu (r,ur,p,d)	Top Valu
Chevron Supreme (up)			Universal		
			Multi Plus		
			Multi		
Esso Petroleum Canada		Shell Canada Ltd.		Turbo Resources Ltd.	
Esso (r)	Esso Plus	Shell (r,ur,up)	Shell	Premium No Lead (up)	Flo-Rite
Esso 2000 (ur)	Esso Extra Motor Oil			Regular No Lead (ur)	Turbo
Esso Extra Unleaded (up)	Uniflo			Regular Leaded (r)	Red Ram
				Regular Purple	
				Diesel Fuel Clear	
				Diesel Fuel Purple	
Federated Co-operatives Ltd.		Sunoco Inc.		Ultramar Canada Inc.	
Sonic (r,ur,up)	HD7	Sunoco Regular (r)	Dynalube	Ultramar (r,ur,p,up)	Ultralube
Co-op (d,o)	DMO	Sunoco 1/2&1/2 Leaded	Sunfleet	Spur (r,ur,up)	Ultralube Mono-grade HD
Agripower (r)	Multrex	(r,up)	Special	Pipeline (r,ur,up)	Ultralube Super Multigrade
	Sonic Premium	Sunoco Premium Leaded	CAM2	XL (r,ur,up)	Spur Multigrade
		(r,up)		Arrow (r,ur,up)	Spur Supreme
Gulf Canada Ltd.		Sunoco Regular Unleaded			Castrol
Gulf (r,ur,up)	Gulf	(ur)			
		Sunoco 1/2&1/2 Unleaded			
		(ur,up)			
Husky Oil Marketing Company		Sunoco Premium			
Husky (r,ur,up,d)	Husky Heavy Duty	Unleaded (up)			
	Husky Heavy Duty Special	Pronto (r,ur,up)			
	Husky Stratolube				
	Husky Stratoplus				
Mohawk Oil Co. Ltd.		Sunys Petroleum Inc.		KEY	
Mohawk (r,ur,up,d,o)	Mohawk Propane	Sunys (r,ur,p,d)		Gasoline:	
Speedway (r,ur,up,d,o)	Mohawk Multigrade	Econave (r,ur,p,d)		(r) Regular	
Payless (r,ur,up,d,o)	Mohawk Premium	Econobec (r,ur,p,d)		(p) Premium	
	Mohawk Heavy Duty Plus			(ur) Unleaded	
	Duckhams			(up) Unleaded Premium	
	Canadian Pride			Motor Oils: Brand names are listed	
Murphy Oil Co. Ltd.		Texaco Canada Ltd.		lowest-price grade first.	
Spur (r,ur,up)	Spur	Texaco (r,ur,up)	Havoline Supreme		
Gas (r,ur,up)			Havoline		
			URSA Super Plus Multi-grade		
			URSA Super Plus Single-grade		

How Distribution is Organized

BRANDED JOBBERS/COMMISSION AGENTS					BULK PLANTS				TERMINALS			
Full-serve/ Self-serve	SELLING ...				COMPANY OPERATED ...				COMPANY OPERATED ...			
	Total	Gasoline only	Fuel Oil only	Gasoline and Fuel Oil	Total	Salary operated	Commission operated	Jobber operated	Total	Salary operated	Commission operated	Jobber operated
0	584	0	0	584	651	0	651	0	52	45	7	0
0	—	—	—	—	316	316	—	—	—	—	—	—
4	500	0	0	500	584	84	279	221	55	45	10	0
3	30	—	—	30	—	—	—	30	1	1	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	37	—	—	—	—	—	—	—	—	—	—
6	27	27	—	—	—	—	—	2	—	—	—	—
4	268	0	3	265	155	10	136	9	19	18	1	0
0	885	453	24	408	268	39	229	9	21	21	0	0
0	0	0	0	0	4	2	0	2	3	3	0	0
—	—	—	—	—	—	—	—	—	—	—	—	—
3	50	23	7	2	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—
—	23	18	—	5	10	—	7	3	—	—	—	—
—	67	—	—	67	84	84	—	—	47	47	—	—

Branded Retail Outlets in Canada

Company	Total branded retail outlets	Number of Provinces	Newfoundland	Nova Scotia	New Brunswick	Quebec	Ontario	Prince Edward Island	Manitoba	Saskatchewan	Alberta	British Columbia
Chevron Canada Ltd.	(A)	1	—	—	—	—	—	—	—	—	—	(A)
Esso Petroleum Canada	3,431	10	191	193	166	581	883	36	237	348	376	420
Federated Co-Op. Ltd.	505	4	—	—	—	—	—	—	80	318	63	44
Gulf Canada Ltd. (C)	2,487	10	57	72	42	510	503	8	227	344	404	286
Husky Oil Ltd.	317	5	—	—	—	—	55	—	29	35	111	87
Irving Oil Ltd. (x)	—	—	—	—	—	—	—	—	—	—	—	—
Loeb Inc. (B)	95	2	—	—	—	23	72	—	—	—	—	—
Mohawk Oil Co. Ltd.	354	5	—	—	—	—	3	—	24	37	204	86
Petro-Canada Prod. Inc.	2,497	10	11	135	87	856	1,018	13	34	37	121	185
Shell Canada Ltd. (C)	3,433	10	—	114	129	830	1,161	31	302	216	303	343
Spur Oil Ltd. (C)	—	—	—	—	—	—	—	—	—	—	—	—
(Div. of Murphy Oil Co. Ltd.)	141	2	—	—	—	136	5	—	—	—	—	—
Sunys Petroleum Inc.	195	2	—	—	—	26	169	—	—	—	—	—
Sunoco Inc.	829	3	—	—	—	302	525	—	—	—	2	—
Texaco Canada	2,261	10	39	117	115	581	837	23	94	106	195	154
Turbo Resources Ltd.	214	5	—	—	—	—	1	—	11	50	120	30
Ultramar Canada Inc.	865	3	188	—	—	466	211	—	—	—	—	—

(x) Did not respond.

(A) Would not provide figure.

(B) Formerly Top Valu Gasmarkets.

(C) Did not respond—figures are for year-end 1983.

Gasoline Shares by Key Categories—1984

This is a new study made public for the first time by MPSI Americas, Tulsa, Okla., which specializes in international computer software and information services as well as marketing research and planning.

It graphically portrays, on both a national and regional basis, market shares by orthodox service stations, by the big pumpers that focus their efforts on gasoline sales, by the convenience stores that also sell gasoline, and by the grab-bag category of "others," which includes car washes, garages and similar facilities where gasoline is secondary.

This study involves primarily the metropolitan areas of Canada, where most of the gasoline is marketed. It makes no attempt to count the rural vendors and the highway units which, while important to the industry, do not add materially to the overall

consumption statistics.

Of significance is the fact that the service stations in these metropolitan areas average more than 172,000 liters (45,438 U.S. gal.) monthly. It also is interesting to note that pumpers in the selected metropolitan areas averaged 279,000 liters (73,704 U.S. gal.) monthly during 1984.

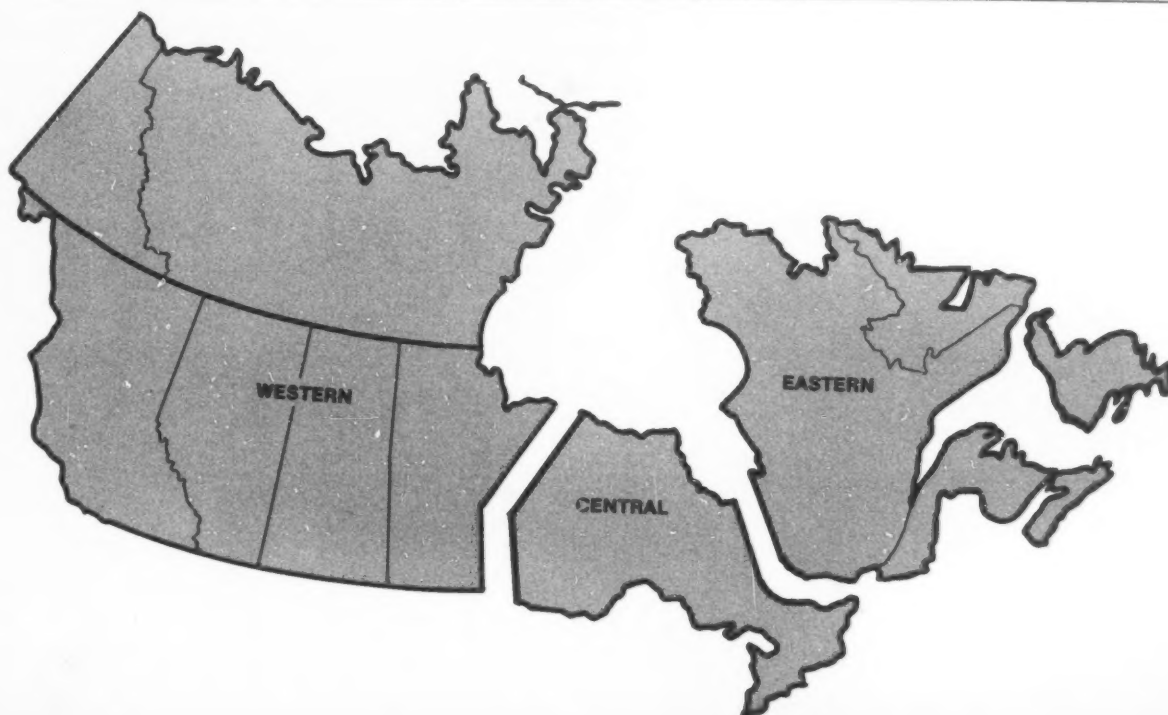
There are many interesting conclusions that can be drawn from the data. For example, in the eastern region, 47% of the gasoline was sold at service stations which also commanded 45% of the total volume in that region. Pumpers were a big factor too, with 21% of the outlets and 36% of the volume.

By way of contrast, service stations in the west represent 56% of the outlets and 58% of the volume. The big pumpers have 28% of the facilities and 34% of the gasoline volume.

Regional Gasoline Outlet Percentages

	Service Stations	Pumpers	Convenience Food Stores	Others	Total
Eastern Region					
• % of Outlets	46.6	20.7	5.7	27.0	100.0
• % of Volume	44.9	35.6	4.9	14.6	100.0
• Avg. Monthly Volume (Liters)(a)	135,736	242,458	121,367	75,181	140,558
Central Region					
• % of Outlets	57.0	26.0	0.7	16.3	100.0
• % of Volume	51.3	41.7	0.6	6.4	100.0
• Avg. Monthly Volume (Liters)	190,940	340,412	188,066	82,422	211,997
Western Region					
• % of Outlets	56.4	27.7	1.7	14.2	100.0
• % of Volume	58.9	34.4	1.3	5.4	100.0
• Avg. Monthly Volume (Liters)	202,824	241,890	149,762	74,811	194,479
Total Canada					
• % of Outlets	52.4	24.0	3.1	20.5	100.0
• % of Volume	51.0	37.8	2.3	8.9	100.0
• Avg. Monthly Volume (Liters)	172,616	279,164	130,491	77,133	177,346

(a) 3.7854 liters equal 1 American gal.; 4.5461 liters equal 1 Imperial gal., which is the conventional standard in Canada.
Source: MPSI Americas Inc., Tulsa, Okla.



Canadian Statistics

Motor Vehicle Registrations 1983

	Passenger Cars	Trucks	Buses	Motorcycles	Other	Total Vehicles
Newfoundland	133,585	59,087	—	6,793	—	199,465
Prince Edward Island	50,521	17,656	412	2,197	220	71,006
Nova Scotia	365,929	156,265	1,428	23,294	2,723	549,639
New Brunswick	259,866	105,710	347	11,640	11,895	389,458
Quebec	2,449,182	304,558	15,517	119,529	35,565	2,924,351
Ontario	3,900,384	1,119,753	24,601	131,606	5,610	5,181,954
Manitoba	478,194	191,194	133	18,704	725	688,950
Saskatchewan	381,934	295,171	4,469	12,122	676	694,372
Alberta	1,290,176	438,799	8,023	59,456	—	1,796,454
British Columbia	1,408,296	594,851	—	79,295	1,217	2,083,659
Yukon	6,821	11,393	165	732	—	19,111
Northwest Territories	6,632	13,309	131	1,043	75	21,190

Source: All tables courtesy of Statistics Canada

Automobiles Per Household 1984

Province	1 Auto	2 Autos	3+ Autos	0 Autos
Newfoundland	53.5%	10.9%	0.0%	35.5%
Prince Edward Island	61.5	20.5	0.0	17.9
Nova Scotia	58.0	16.5	2.7	22.7
New Brunswick	57.6	14.8	3.1	24.4
Quebec	57.4	14.1	2.0	26.4
Ontario	52.6	22.4	3.7	21.2
Manitoba	55.1	18.2	4.2	22.4
Saskatchewan	56.6	18.0	4.5	20.8
Alberta	55.7	20.5	4.8	18.9
British Columbia	55.1	19.5	3.5	21.8
Total	55.1	18.7	3.3	22.8

Note: Data from a sample survey.

New Motor Vehicle Sales

Year	Total	Passenger cars	Commercial vehicles
1984	1,283,502	971,210	312,292
1983	1,081,088	843,318	237,770
1982	920,902	713,481	207,421

(1) Excludes Japanese and North American manufactured vehicles.

Factory Sales of Auto Batteries

	1984	\$	1983	\$
Orig. equip.	confidential	—	confidential	—
Replacement	2,940,626	103,157,892	2,695,969	94,487,362
Heavy-duty transport, motor coach, bus, diesel starting batteries, for replacement	443,301	21,390,620	405,742	19,476,813

Drivers Licenses 1983

Province	Drivers
Newfoundland	296,000
Prince Edward Island	27,985
Nova Scotia	520,586
New Brunswick	390,820
Quebec	3,610,646
Ontario	5,380,286
Manitoba	595,952
Saskatchewan	633,893
Alberta	1,717,087
British Columbia	2,158,739
Yukon	16,500
Northwest Territories	18,078
Total	15,366,572

Heating Fuels in 1984

(000 Households)						
	Piped Oil	Bottled Gas	Elec- tricity	Other*	Wood	Total Households
Newfoundland	66	—	—	55	—	159
Prince Edward Island	31	—	—	—	9	40
Nova Scotia	205	—	4	32	9	292
New Brunswick	108	—	—	67	—	229
Quebec	805	196	NA	1,214	—	2,324
Ontario	710	1,828	15	520	—	3,179
Manitoba	35	223	—	105	—	379
Saskatchewan	53	268	7	14	—	355
Alberta	12	779	18	6	5	824
British Columbia	214	555	9	212	—	1,075
Total	2,240	3,850	62	2,224	15	8,657

Note: Data from a sample survey only.

Other includes Coal and Coke.

have you

COMPARED

PRICE - INSTALLATION - FEATURES



of the latest Bennett Systems with
the equipment you're now using?

If not, maybe you should ...
your competition is.

It's Fair to Compare
BENNETT.
Muskegon, Michigan 49444

LPG Sales Trend

Major Domestic Markets (Add 000,000 gal.)

Year	Total U.S. sales		Residential-commercial		Chemical		Internal combustion		Industrial		All other uses	
	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change
1984 (a)	20,419	4.4%	(See special note below)									
1983 (a)	19,558	0.6										
1982	19,441	-6.5	4,047	-4.3%	9,679	-7.3%	644	16.2%	2,095	0.6%	2,976	-15.2%
1981	20,803	8.3	4,217	-11.5	10,438	27.9	554	24.8	2,083	-1.0	3,511	-5.8
1980	18,604	-3.1	4,373	-8.2	7,808	-4.3	508	14.4	2,217	5.3	3,698	-1.0
1979	19,202	27.8	4,764	-31.5	8,160	129.0	444	-55.3	2,105	57.1	3,728	71.6
1978	15,023	-3.1	6,954	-3.0	3,563	-0.4	993	-13.3	1,340	28.4	2,172	-15.6
1977	15,508	-3.2	7,169	-2.0	3,578	-12.4	1,145	-2.1	1,044	—	2,573	7.5
1976	16,013	5.3	7,313	4.2	4,085	-2.1	1,170	—	1,052	-2.8	2,394	35.8
1975	15,200	-6.8	7,020	-2.9	4,172	-23.0	1,162	-11.3	1,082	1.2	1,763	38.3
1974	16,306	-5.0	7,231	-7.8	5,422	-9.0	1,310	-7.0	1,069	2.4	1,275	46.2
1973	17,812	-1.1	7,846	-5.0	5,960	1.0	1,409	-4.7	1,095	-2.3	872	41.1
1972	17,373	12.1	8,253	7.6	5,898	15.1	1,479	11.7	1,124	23.7	618	30.7
1971	15,498	1.5	7,668	1.3	5,124	2.4	1,324	—	909	1.3	473	1.3
1970	15,271	26.6	7,569	41.6	5,003	24.8	1,336	11.9	897	32.1	467	125.6
1965	11,434	33.7	5,346	26.5	4,008	54.6	1,194	33.0	679	13.9	207	-23.0
1960	8,579	40.1	4,225	50.8	2,593	36.5	898	37.7	596	13.7	269	9.3
1955	6,123	75.8	2,801	38.5	1,899	122.6	652	401.5	524	241.6	246	-7.7
1950	3,433	—	2,022	—	853	—	130	—	217	—	260	—

(a) Estimated by NPN on basis of Energy Information Administration charts and data.

Special note: Energy Information Administration suddenly discontinued the collection of the basic data on LPG end-use sales in 1984, citing budget retrenchments imposed by the Administration. Thus, no 1983 end-use data was available in May 1985. American Petroleum Institute, in cooperation with Liquefied Petroleum Gas Assn. and others, began collecting the LPG data in early 1985 for the year 1984, but did not expect to have it available much before mid-summer, and then mostly in tentative form.

Source: For data 1950 through 1982, Energy Information Administration, Petroleum Supply Annual, 1983; for 1983 and 1984, estimates by NPN.

WE'RE FIGHTING FOR YOUR LIFE
American Heart Association 



I'D RATHER QUIT THAN FIGHT HEART DISEASE.

Don't let smoking knock you out. Quit today. And give yourself a fighting chance. When you stop smoking you are helping decrease your risk of heart disease. In fact, the Surgeon General has stated that cigarette smoking is the most preventable risk factor in heart disease.

So fight back against heart disease. Quit smoking. For more information on how you can stop smoking contact the American Heart Association.

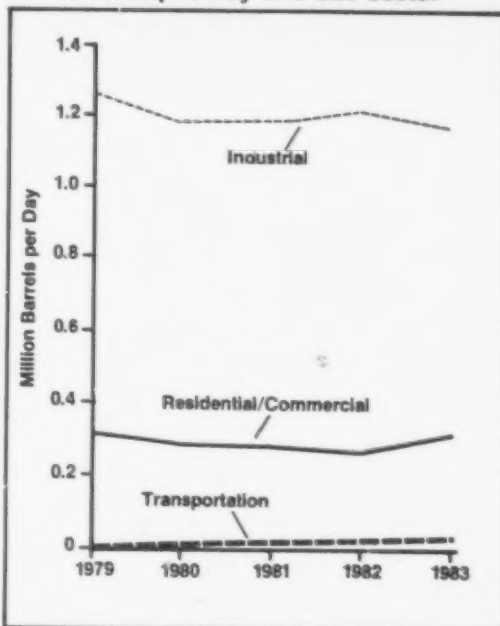
LPG Consumption Rises 4% in 1984 to Near-Record Level

Consumption of liquefied petroleum gases increased 4% in 1984, almost equalling the peak period of 1.6-million b/d set in 1979, the Energy Information Administration says. During the intervening years—1979 to 1984—consumption averaged around 1.5-million b/d.

There are no specific figures available for 1983 or 1984, however, because EIA discontinued the collection of LPG data unexpectedly in 1984 due to budgetary retrenchments. The American Petroleum Institute, Liquefied Petroleum Gas Assn. and others picked up the dropped ball in early 1985, but their numbers were not expected to be available until sometime this summer. Meantime, EIA's graph (right) was based on data collected by its State Energy Data System.

About 80% of the consumption of LPG is in the industrial sector, primarily as a feedstock in the petrochemical industry. Most of the remainder is used in residential and commercial applications. A very small but growing portion is used in transportation, where the clean-burning properties of LPG provide longer engine life and reduced maintenance costs, lower emissions and less engine noise.

LPG Consumption by End-Use Sector

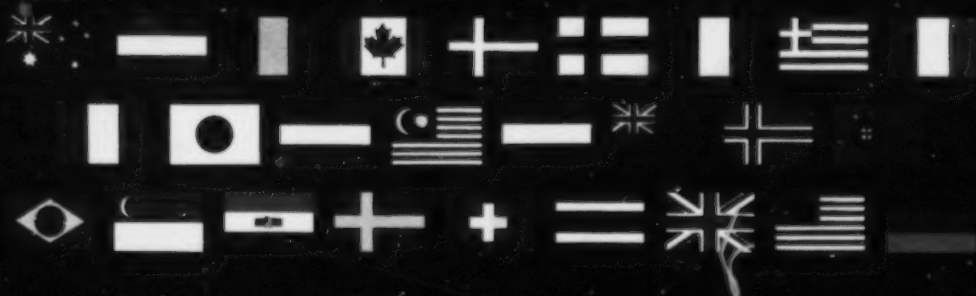


Source: Energy Information Administration, State Energy Data System

LPG Supply and Disposition 1974-1984

	Supply			Disposition			Ending Stocks (Million bbl.)
	Total Production	Imports	Stock Withdrawal (Add 000 b/d)	Refinery Inputs	Exports	Products Supplied	
1974 Average	1,565	123	-38	220	25	1,406	113(a)
1975 Average	1,527	112	-35(a)	246	26	1,333	125
1976 Average	1,535	130	24	260	25	1,404	116
1977 Average	1,566	161	-55	233	18	1,422	136
1978 Average	1,537	123	12	239	20	1,413	132
1979 Average	1,556	217	70	236	15	1,592	111
1980 Average	1,535	216	-27	233	21	1,469	120(a)
1981 Average	1,571	244	-18(a)	289	42	1,466	135
1982 Average	1,528	226	111	300	65	1,499	94(a)
1983 January	1,611	240	520(a)	313	118	1,939	86
February	1,600	305	128	244	76	1,713	82
March	1,543	166	-9	197	127	1,377	82
April	1,607	124	-156	198	116	1,260	87
May	1,613	167	-225	207	84	1,263	94
June	1,664	172	-334	203	59	1,241	104
July	1,656	191	-221	217	55	1,354	111
August	1,586	160	-199	229	29	1,289	117
September	1,705	178	-30	236	86	1,531	118
October	1,688	160	-81	268	32	1,467	120
November	1,785	180	70	362	33	1,640	118
December	1,645	247	575	363	66	2,038	101(a)
Average	1,642	190	4	253	73	1,509	
1984 January	1,610	269	470(a)	333	23	1,993	93
February	1,690	237	146	323	41	1,708	89
March	1,685	241	12	289	68	1,581	89
April	1,711	155	-170	253	54	1,389	94
May	1,709	211	-221	244	42	1,412	101
June	1,714	158	-189	237	53	1,394	106
July	1,750	132	-138	232	43	1,469	111
August	1,744	154	-132	241	34	1,491	115
September	1,704	128	-24	283	26	1,499	115
October	1,683	207	137	322	56	1,648	111
November	1,719	212	90	376	52	1,593	106
December	1,681	237	241	351	82	1,727	101
Average	1,700	195	19	291	48	1,576	

(a) In January of 1975, 1981, 1983 and 1984, a new stock basis was established which affected withdrawals and ending stocks.
Source: Petroleum Supply Monthly, Energy Information Administration, January 1985 (March).



The flags represent the countries where over 75 long-term users of MPSI's Retail Planning System[®] conduct their business.

Tonight, as you sleep,

somewhere in the world an MPSI professional is studying *tomorrow*. Making it as clear as today for our worldwide, knowledge-seeking clients.

When they awake

they will have the information necessary for decision-making.

Why?

Because they will have the benefit of *knowing* the outcome of each possible strategy *before* they decide which one to implement.

MPSI . . . 20/20 Foresight.



MPSI Systems Inc.

International Computer Software and Information Services.

World Headquarters

MPSI Centre

8282 South Memorial Drive

Tulsa, Oklahoma 74133

Motor Oil Trends in 1984: An Overview

As they have been through the years, do-it-yourselfers were again the principal purchasers of motor oils in 1984. The year-end survey by NPD Auto-Facts, Houston, Texas, confirms that seven out of 10 quarts of motor oil were purchased for off-premises use.

A note of interest—but certainly not of concern at this point in time—was the erosion for the second consecutive year in share-of-purchases by the do-it-yourselfers. In 1982, for example, they accounted for 71%. In 1983, they dropped to 70%. The 1984 survey showed they dropped again, this time to 69%. This put them back to their 1980 level of purchases.

Mass merchandisers, with by far the best prices for motor oils, continued to be the leading distributors. The average retail price in 1984 was \$1.06 per quart for the second consecutive year. By way of comparison, service stations averaged \$1.73 a quart, up 8¢ over 1983 which, in itself, was up 6¢ over the preceding year. Other traditional outlets, such as car dealers, garages and auto supply stores, moved their motor oils at an average \$1.20 per quart, down 10¢ from 1983.

The average family in the NPD survey spent \$15.76 on motor oils in 1984, the same as the year before. The average family also used a bit less motor oil in 1984—about a half-quart. This factor has been decreasing right along, probably reflecting better quality and longer-life motor oils which require fewer make-up additions and generally extend change intervals.

Service stations continued to lose ground in 1984 as a source of motor oil purchases. The NPD Survey shows that the service station share of market declined to 16% in 1984, down 2% from 1983 and 5% from 1982. Picking up their "lost" business were car dealers, auto supply stores, garages and tire stores, whose share rose from 20% in 1982 to 23% in 1983 and to 26% in 1984.

NPD Auto-Facts has been using a diary track methodology in its surveys and the figures reflect purchases by family households. NPD said the diary panel study, however, was discontinued at the end of 1984. It had been in operation since 1978. NPD has several other ongoing motor oil surveys available, including its Automotive Oils Index which tracks consumer purchasing behavior in the marketplace.

NPD Auto-Facts, which has offices in Houston, New York, Chicago and Los Angeles, estimates that families purchase 50% to 60% of the motor oil bought for passenger cars and light trucks.

The Market Share Battle

Retail Segment	Avg. Retail Price		Primary Market	Market Share	
	1984	1983		1984	1983
Mass Merchandisers (discount stores, department stores, supermarkets, drug stores and others)	\$1.05	\$1.06	DIY (a)	58%	59%
Service Stations	1.73	1.65	Refiners (b)	16	18
Other Traditional Outlets (car dealers, auto supply stores, garages and tire stores)	1.20	1.30	Refiners & DIY	26	23
Total Industry	\$1.21	\$1.21			

(a) Do-it-yourselfers accounted for 70% of the motor oil purchases in 1982; (b) Motorists who rely on service stations, car dealers, etc., to change their oil.

The Channels of Distribution (a)

	1984	1983	1982	1981	1980
Service Stations	NA	NA	20.8%	23.4%	25.7%
Discount Stores	NA	NA	30.1	29.2	29.3
Department Stores	NA	NA	10.0	7.8	6.2
Supermarket/Drug Stores	NA	NA	9.2	9.3	8.6
Others	NA	NA	10.1	11.3	10.1
Auto Supply Stores	NA	NA	9.8	10.5	9.7
Tire Stores/Garages	NA	NA	5.2	4.3	5.3
Car Dealers	NA	NA	4.8	4.4	3.1

(a) By quarts by place of purchase

How the Oil Is Used

	1984	1983	1982	1981	1980
Oil Change	53%	47%	46%	46%	46%
Add Oil	16	17	16	20	20
Future Use	14	15	13	14	16
Duplicate Use	10	19	21	20	18

Who Buys the Most of It

	1984	1983	1982	1981	1980
Carried Out by Purchaser (installed at some other place) (a)	69%	70%	71%	70%	69%
Installed Where Bought (b)	31	30	29	30	31

(a) Generally considered to be the do-it-yourselfer; (b) generally considered to be the "refiner," i.e., depending on service man for performance.

Dollars Spent per Average Family

	1984	1983	1982	1981	1980
Dollars Spent	\$15.76	\$15.76	\$16.56	\$17.10	\$16.91
Average Price Paid per Quart	1.17	1.21	1.22	1.17	1.08
Average Quarts per Transaction	4.92	4.30	4.10	4.10	4.40
Annual Quarts Purchased	13.50	13.00	13.60	14.70	15.70

Source: Diary Panel Index (NPD Auto-Facts) April 1985.

Lube Oil Sales Projections

U.S. Demand for Automotive Base Oils

Year	(Add 000,000 gal.)			(Add 000,000 bbl.)	
	Engine Oils	Hydraulic Oils	Other Lubes	Total	Total
1995	1,062	198	50	1,250	29.8
1990	873	189	48	1,210	28.8
1985	981	179	47	1,207	28.7
1984	984	176	46	1,206	28.7
1983	933	172	44	1,149	27.4

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

U.S. Demand for Lubricating Base Oils

Year	(Add 000,000 bbl.)				
	Total	Automotive Lubes	Industrial Oils	Process Oils	Losses/Minor Products
1995	62.1	29.8	19.8	8.9	3.6
1990	59.9	28.8	19.1	8.5	3.5
1985	54.9	28.7	16.4	6.5	3.3
1984	56.6	28.7	17.4	7.1	3.4
1983	53.4	27.4	16.3	6.7	3.0

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

Past and Projected Demand for Finished Lubes

	(Millions of gal.)						(Millions of gal.)				
	1983	1984	1985	1990	1995		1983	1984	1985	1990	1995
Automotive Oils						Industrial Oils					
Engine Oils	1,080	1,118	1,115	1,108	1,138	General Lubricants...	410	450	420	495	515
Hydraulic Oils	185	200	202	215	225	Metalworking Oils...	168	180	170	190	195
Gear Oils	50	52	53	54	57	Industrial Engine Oils...	132	135	130	155	160
						Process Oils	285	300	275	355	375
Total Automotive...	1,305	1,370	1,370	1,375	1,420	Total Industrial...	995	1,065	995	1,195	1,245
Total Lubricants...	1983—2,300	1984—2,435	1985—2,365	1990—2,570	1995—2,665						

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

Automotive Sales

	(Add 000 gal.)	
	1982	1983
SAE J-183a, Engine Oils		
Monograde	425,813	426,128
Multi-graded	501,165	592,343
Sub Total	956,978	1,018,470
NON SAE J-183a, Engine Oils		
Aircraft	9,227	9,008
Gasoline Fueled Two-stroke	11,736	12,975
Sub Total	20,963	21,983
Transmission and Hydraulic Fluids		
Automatic Trans. Fluids	128,800	131,066
Universal Tractor Fluids, HYD/Trans.	43,211	44,794
Shock Absorber/Steering Fluid	8,108	9,662
Other (Manual Trans., etc.)	2,650	3,640
Sub Total	180,969	189,162
Gear Lubricants		
GL-4 Less	4,533	5,014
GL-5 and GL-6	40,173	43,530
Sub Total	44,706	48,544
Total Automotive	1,203,616	1,278,159

Source: National Petroleum Refiners Assn. (NPDRA) "1983 Report on U.S. Lubricating Oil Sales"

Industrial Sales

	(Add 000 gal.)	
	1982	1983
General Industrial Lubricants		
Hydraulic Oils	179,936	185,624
Gear Oils	32,337	33,552
Other Specified	118,822	127,687
Other Unspecified	1,214	2,227
Sub Total	332,309	349,094
Industrial Engine Oils		
Railroad Diesel	50,043	51,925
Marine	42,691	41,040
Natural Gas	41,221	38,615
Sub Total	133,955	131,580
Metalworking		
Specified	74,813	82,772
Unspecified	2,495	1,029
Sub Total	77,308	83,801
Process Oils		
Specified	251,016	272,198
Total Industrial	794,588	836,673

Source: National Petroleum Refiners Assn. (NPDRA) "1983 Report on U.S. Lubricating Oil Sales"

Total Industrial & Automotive Lube Sales

	(Add 000 gal.)		
	1981	1982	1983
Total Industrial Lube Sales	942,318	794,588	836,673
Total Automotive Lube Sales	1,240,040	1,203,616	1,278,159
GRAND TOTAL	2,182,358	1,998,204	2,114,832

Source: National Petroleum Refiners Assn. "1983 Report on U.S. Lubricating Oil Sales"



R.I.P.

Be honest. What you'd like to do with an underground petroleum tank is bury it and forget it.

No hassles. No maintenance expenses. Definitely, *no leaks*.

And the ability of Fiberglas® tanks to rest in peace because they *can't rust* has always been their main advantage over steel tanks, which can rust.

Now new legislation has made Fiberglas tanks an even more obvious choice—and value—compared to steel.

NEW LAW

Because of national concern over leaking underground tanks, Federal law now prohibits burial of bare steel tanks in most parts of the country. This, in effect, narrows your choice to fiber glass tanks and two types of "protected" steel tanks.

Cathodically protected steel tanks should be regularly *monitored* to ensure that the protection system is working. The other type of protected steel tank has a non-corrosive coating that requires utmost care in han-

dling. Even microscopic pinholes or scratches can invite rust.

Danger lurks inside steel tanks, too. Water from condensation can cause rust and, eventually, require tank replacement or relining.

Fiberglas tanks simply can't rust—inside or out. That's why Owens-Corning petroleum tanks carry a 30-year limited warranty against external and internal corrosion. *This warranty also applies for storage of gasohol (10% ethanol) and gasoline blended with Oxinol-50* (4.75% methanol and 4.75% GTBA).*

The simplicity and life-cycle economy of fiber glass tanks have made them the overwhelming choice of major oil companies. And Owens-Corning, the pioneer of glass-fiber technology, has now become the world's largest manufacturer of underground tanks. With over 100,000 Owens-Corning petroleum storage tanks buried, there has never been one leak due to rust!

CALL OWENS-CORNING BEFORE YOU BUY

Purchasing an underground petroleum storage tank in today's environment is a major decision. No longer can this decision be made solely on initial cost. So take time now to consult with an Owens-Corning representative, and prevent unnecessary costs in the future. Our rep will tell you about our broad product line and responsive service. He'll also give you more information on the performance and price of Owens-Corning tanks.

Send for our catalog (Non-corrosive Products Division, Owens-Corning Fiberglas Corporation, Toledo, Ohio 43659) or call 800-537-4730 now. Then you'll rest easier.

*TM Arco Chemical Co.
© O. C. F. Corp. 1985

OWENS/CORNING
FIBERGLAS
TRADEMARK

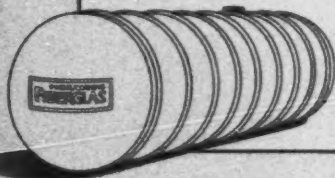
FIBERGLAS VS. PROTECTED STEEL Recommended steps for installation and maintenance

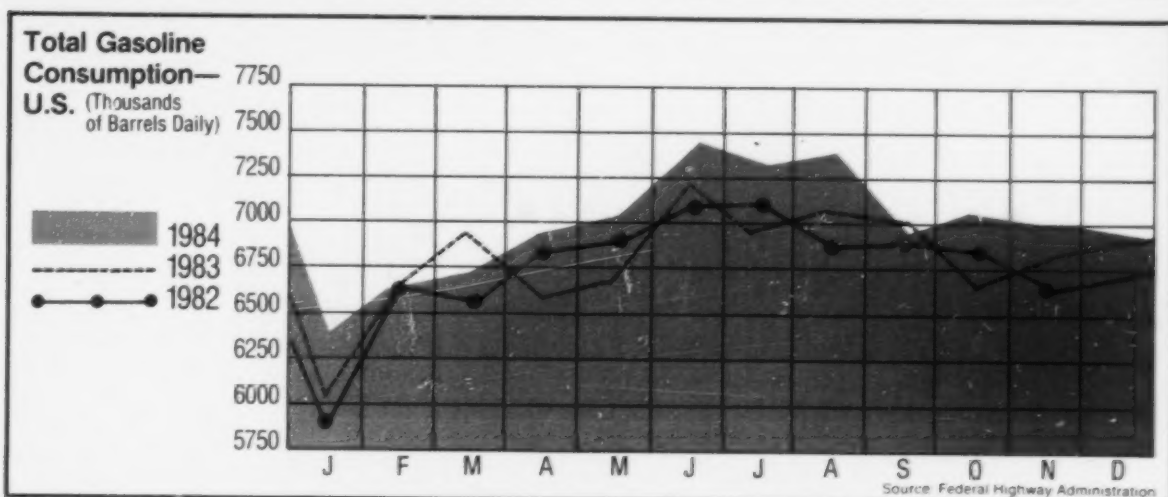
FIBERGLAS®

1. Install with required gravel backfill.

CATHODICALLY PROTECTED STEEL

1. Test soil corrosiveness to assure tank warranty applies.
2. Check anode connection in OSHA-approved hole.
3. Check dielectric bushings on piping/fitting connections.
4. Install with proper compaction of backfill.
5. Install equipment to detect when anodes are operating or sacrificed.
6. Replace sacrificial anodes when necessary.





Gasoline Consumption by States

(includes on-highway and off-highway consumption)

	1984 Rank	Total Gasoline (a)		% Chng. '84 v. '83	Gasohol Included (b)	
		(Add 000 gal.)			(Add 000 gal.)	
		1984	1983		1984	1983
Alabama	22	1,905,267	1,861,406	2.4%	34,899	29,637
Alaska	50	248,993	221,209	12.5	—	—
Arizona	27	1,505,607	1,410,904	6.7	—	772
Arkansas	32	1,193,067	1,128,357	5.7	28,871	12,631
California	1	11,413,578	11,032,662	3.5	401,837	480,850
Colorado	26	1,531,728	1,560,776	(1.9)	62,837	56,562
Connecticut	29	1,372,038	1,308,077	4.9	5,421	1,476
Delaware	48	320,246	308,772	3.7	—	—
Dist. of Col.	51	183,613	168,019	9.3	63	52
Florida	4	5,261,728	5,078,234	3.6	508,751	357,232
Georgia	10	3,092,597	2,904,369	6.5	16	158
Hawaii	46	371,084	335,332	4.4	—	—
Idaho	41	459,144	459,377	—	6,658	8,747
Illinois	6	4,677,169	4,609,320	1.5	263,127	240,000
Indiana	12	2,906,333	2,479,277	17.2	483,063	525,076
Iowa	28	1,398,174	1,394,722	0.2	457,228	510,206
Kansas	30	1,264,521	1,240,248	2.0	249,296	67,396
Kentucky	24	1,764,566	1,734,296	1.7	328,238	100,646
Louisiana	17	2,166,617	2,151,035	0.7	24,424	—
Maine	38	530,799	519,891	2.1	—	—
Maryland	21	1,959,267	1,892,434	3.5	82	74
Massachusetts	16	2,340,189	2,266,746	3.2	—	56
Michigan	7	4,042,347	3,680,884	9.8	577,723	565,991
Minnesota	18	2,084,655	1,985,492	5.0	2,707	3,578
Mississippi	33	1,191,027	1,158,134	2.8	—	—
Missouri	14	2,587,350	2,536,042	2.0	—	6,996
Montana	40	474,004	459,851	3.1	8,303	11,326
Nebraska	36	780,071	776,930	0.4	208,455	183,345
Nevada	39	504,529	489,835	3.0	—	283
New Hampshire	42	434,424	405,203	7.2	—	—
New Jersey	9	3,358,176	3,371,871	(0.4)	—	—
New Mexico	37	764,798	740,916	3.2	56,494	26,589
New York	3	6,261,510	5,491,074	14.0	—	—
North Carolina	11	3,042,021	2,911,221	4.5	34,037	2,912
North Dakota	44	390,514	390,085	0.1	5,469	4,440
Ohio	5	4,877,793	4,634,793	5.2	399,988	489,292
Oklahoma	23	1,877,792	1,907,622	(1.6)	23,620	75,704
Oregon	31	1,263,213	1,222,903	3.3	298	1,130
Pennsylvania	8	4,036,989	4,370,547	(0.1)	—	—
Rhode Island	45	378,252	365,634	3.5	—	—
South Carolina	25	1,599,698	1,538,188	3.9	154	1,018
South Dakota	43	399,875	389,287	2.7	37,850	31,947
Tennessee	15	2,346,990	2,331,655	0.7	109,762	—
Texas	2	8,501,979	8,393,680	1.3	207,152	282,091
Utah	34	881,906	725,317	21.6	25,862	—
Vermont	49	252,093	242,056	4.1	—	—
Virginia	13	2,665,515	2,554,245	4.4	131,618	46,213
Washington	20	2,000,333	1,919,152	4.2	9,143	7,943
West Virginia	35	800,672	801,736	(0.1)	—	—
Wisconsin	19	2,022,610	2,011,843	0.5	1,962	1,046
Wyoming	47	358,076	338,752	5.7	288	202
Total U.S.		108,045,537	104,231,431	3.7	4,695,230	4,133,857

(a) These totals reflect the gross gal. of gasoline reported for tax purposes by wholesale distributors in each state. The data includes highway and non-highway uses and losses. Gasohol data also is included.

(b) These totals show gross gal. of gasohol (ethanol blends) reported by distributors in each state. However this total should not be considered as a national total because in states where gasohol is taxed at the same rate as gasoline, the gallonage data is not reported separately; in other states, partial tax exemptions may have been legislated, but the reporting systems have not been converted for separate reporting.

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

State Gasoline Consumption by Rank

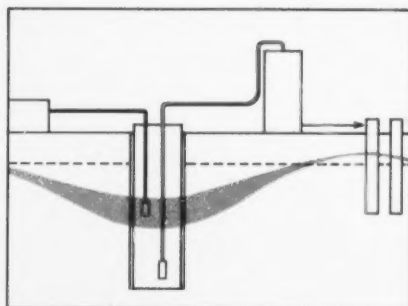
State	1984 Rank	1983 Rank	(Add 000) 1984 Gallons
California.....	1	1	11,413,578
Texas.....	2	2	8,501,979
New York.....	3	3	6,261,510
Florida.....	4	4	5,261,728
Ohio.....	5	5	4,877,793
Illinois.....	6	6	4,679,169
Michigan.....	7	8	4,042,347
Pennsylvania.....	8	7	4,036,989
New Jersey.....	9	9	3,518,176
Georgia.....	10	11	3,092,597
North Carolina.....	11	10	3,042,021
Indiana.....	12	14	2,906,433
Virginia.....	13	12	2,665,515
Missouri.....	14	13	2,587,350
Tennessee.....	15	15	2,346,990
Massachusetts.....	16	16	2,340,189
Louisiana.....	17	17	2,166,617
Minnesota.....	18	19	2,084,655
Wisconsin.....	19	18	2,022,610
Washington.....	20	20	2,000,333
Maryland.....	21	22	1,959,267
Alabama.....	22	23	1,905,267
Oklahoma.....	23	21	1,877,792
Kentucky.....	24	24	1,764,566
South Carolina.....	25	26	1,599,698
Colorado.....	26	25	1,531,728

Source: Federal Highway Administration, Monthly Reports.

State	1984 Rank	1983 Rank	(Add 000) 1984 Gallons
Arizona.....	27	27	1,505,607
Iowa.....	28	28	1,398,174
Connecticut.....	29	29	1,372,038
Kansas.....	30	30	1,264,521
Oregon.....	31	31	1,263,213
Arkansas.....	32	33	1,193,067
Mississippi.....	33	32	1,191,027
Utah.....	34	37	881,906
West Virginia.....	35	34	800,672
Nebraska.....	36	35	780,071
New Mexico.....	37	36	764,798
Maine.....	38	38	530,799
Nevada.....	39	39	504,529
Montana.....	40	40	474,004
Idaho.....	41	41	459,314
New Hampshire.....	42	44	434,424
South Dakota.....	43	42	399,875
North Dakota.....	44	43	390,514
Rhode Island.....	45	45	378,252
Hawaii.....	46	46	371,084
Wyoming.....	47	47	358,076
Delaware.....	48	48	320,246
Vermont.....	49	49	252,093
Alaska.....	50	50	248,993
District of Columbia.....	51	51	183,613

Source: Federal Highway Administration, Monthly Reports.

Underground leak problems??



GROUNDWATER TECHNOLOGY

- | | |
|--|---|
| ☐ Assessment | ☐ Aquifer restoration/In situ bioremediation |
| ☐ Recovery | ☐ Facility risk management |
| ☐ Analytical laboratory | ☐ Hazardous vapor response |

OIL RECOVERY SYSTEMS EQUIPMENT

- | | |
|--|---|
| ☐ Scavenger® recovery systems | ☐ Water purification systems |
| ☐ Portable monitoring/gauging equipment | |
| ☐ Soil venting | ☐ CMS® Electronic leak detection |

BEST AVAILABLE TECHNOLOGY COST EFFECTIVE METHODOLOGY

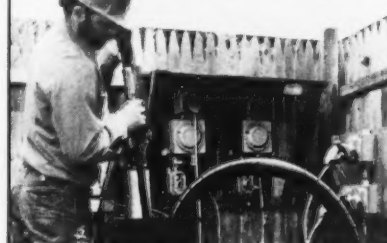
CALL, COLLECT OR WRITE:



GROUNDWATER TECHNOLOGY A division of: OIL RECOVERY SYSTEMS, INC.

1420 Providence Hwy., Norwood, MA 02062 USA, (617) 769-7600, telex 92-8420
Offices nationwide and overseas.

For underground clean-up



- Low Cost
- Safe
- Easy to Maintain
- Fully Automatic

The Petropurge System utilizes the widely accepted "two pump" technique for removing and recovering gasoline and liquid fuels from polluted soil and groundwater. For more information, contact:

nepcco

29 Wall Street
Foxboro, MA 02035
(617) 543-8458

Gasoline Octanes, U.S. Service Stations

Year	Season	Regular grade ⁽¹⁾			Premium grade ⁽²⁾			Unleaded grade		
		Rsh.	Mtr.	(R + M)*	Rsh.	Mtr.	2	Rsh.	Mtr.	(R + M)*
				2						2
1984	Summer	92.9	85.0	89.0	—	—	—	91.6(a)	82.9(a)	87.3(a)
1983-84	Winter	92.7	84.9	88.8	—	—	—	96.5(b)	86.9(b)	91.7(b)
1983	Summer	93.1	84.9	89.0	—	—	—	91.7(a)	82.9(a)	87.3(a)
1982-83	Winter	92.9	85.2	89.1	—	—	—	96.1(b)	86.6(b)	91.3(b)
1982	Summer	93.0	85.0	89.0	—	—	—	92.0(a)	82.9(a)	87.5(a)
1981-82	Winter	92.7	85.1	88.9	98.1	87.8	93.0	96.2(b)	86.5(b)	91.4(b)
1981	Summer	92.8	85.1	89.0	—	—	—	91.7(a)	82.9(a)	87.3(a)
1980-81	Winter	92.8	85.4	89.1	97.3	89.2	93.3	96.3(b)	86.7(b)	91.5(b)
1980	Summer	96.2	85.2	88.9	97.0	88.6	92.8	91.9(a)	82.8(a)	87.3(a)
1979-80	Winter	92.5	85.5	89.0	97.2	89.3	93.2	96.8(b)	86.6(b)	91.7(b)
1979	Summer	92.8	85.7	89.3	97.6	89.8	93.7	91.8(a)	82.9(a)	87.4(a)
1978-79	Winter	93.2	85.9	89.6	98.0	90.3	94.2	96.6(b)	86.8(b)	91.7(b)
1978	Summer	93.2	85.7	89.5	98.2	90.4	94.3	91.9(a)	83.0(a)	87.4(a)
1977-78	Winter	93.2	85.7	89.5	98.8	91.0	94.9	96.3(b)	86.2(b)	91.3(b)
1977	Summer	93.2	85.9	89.6	98.7	91.2	95.0	91.9(a)	83.0(a)	87.4(a)
1976-77	Winter	93.2	86.1	89.7	98.8	91.4	95.1	96.3(b)	86.2(b)	91.3(b)
1976	Summer	93.3	86.0	89.6	98.9	91.4	95.2	91.9(a)	83.3(a)	87.6(a)
1975-76	Winter	93.4	86.0	89.7	98.9	91.4	95.2	96.1(b)	86.5(b)	91.4(b)
1975	Summer	93.4	86.0	89.7	98.9	91.4	95.2	92.1(a)	83.4(a)	87.8(a)
1974-75	Winter	93.4	86.1	89.9	98.9	91.6	95.3	96.1(b)	86.4(b)	91.6(b)
								92.1(a)	83.7(a)	87.9(a)
								97.1(b)	87.0(b)	92.1(b)
								93.0	84.1	88.6
								93.1	84.3	88.7
								93.0	83.9	88.5
								92.9	83.9	88.4
								92.9	83.9	88.5
								92.6	84.1	88.4
								92.4	83.9	88.2
								92.3	84.0	88.2
								92.1	83.9	88.0
								92.3	84.0	88.2

*Antiknock index.

(1) Below 93.0 octane; (2) 93.0 octane and above.

(a) Unleaded below 90. (b) Unleaded 90 and above.

Source: Motor Gasolines, Summer 1984—National Institute for Petroleum and Energy Research, Bartlesville, Okla., February 1985.

Gasoline Octanes, Regional Averages

	Unleaded Octane Number						Leaded Octane Number					
	Index Below 90			Index Above 90			Index Below 93			Index Above 93 (a)		
	Rsch.	Mtr.	(R + M)	Rsch.	Mtr.	(R + M)	Rsch.	Mtr.	(R + M)	Rsch.	Mtr.	(R + M)
			÷ 2			÷ 2			÷ 2			÷ 2
Northeast	92.5	82.8	87.6	96.6	86.9	91.8	93.4	85.1	89.2	—	—	—
Mid-Atlantic Coast	92.2	82.6	87.4	97.2	86.7	92.0	93.2	85.3	89.3	—	—	—
Southeast	91.7	82.8	87.3	96.9	86.8	91.9	93.1	85.5	89.4	—	—	—
Appalachian	91.7	82.9	87.4	96.3	87.3	91.8	92.6	85.1	88.9	—	—	—
Michigan	91.3	83.1	87.2	95.8	87.2	91.6	93.5	85.9	89.7	—	—	—
North Illinois	91.0	83.4	87.2	95.9	87.3	91.6	93.3	85.6	89.5	—	—	—
Central Mississippi	91.6	82.7	87.2	96.4	87.3	91.9	93.0	85.2	89.1	—	—	—
Lower Mississippi	91.7	83.2	87.5	97.0	87.2	92.1	92.8	85.8	89.3	—	—	—
North Plains	91.7	83.1	87.4	96.7	87.9	92.3	92.3	83.8	88.1	—	—	—
Central Plains	91.5	83.5	87.5	94.8	86.3	90.6	93.2	85.4	89.3	—	—	—
South Plains	91.3	82.8	87.1	96.9	86.5	91.7	92.6	85.0	88.8	—	—	—
South Texas	91.7	82.6	87.2	97.0	86.9	91.9	93.1	85.4	89.3	—	—	—
South Mountain States	90.7	82.1	86.4	96.7	86.1	91.4	91.5	84.1	87.8	—	—	—
North Mountain States	89.9	82.4	86.2	95.3	86.3	90.9	91.9	82.8	87.4	—	—	—
Pacific Northwest	91.8	83.4	87.6	96.1	87.1	91.6	92.4	85.0	88.8	—	—	—
North California	93.0	83.4	88.2	97.2	86.4	91.8	98.4	84.9	89.7	—	—	—
South California	92.7	83.3	88.0	97.4	87.0	92.2	93.5	85.3	89.4	—	—	—
Average												
Summer 1984	91.6	82.9	87.3	96.5	86.9	91.7	92.9	85.0	89.0	—	—	—
Summer 1983	92.0	82.9	87.5	96.2	86.5	91.4	93.1	84.9	89.0	—	—	—

(a) In 1981, DOE began two classifications for leaded gasoline—below 93 octane and above 93 octane; however, nothing has been published in the above 93 octane category since the winter of 1981-82.

Source: Motor Gasolines, Summer 1984, National Institute for Petroleum and Energy Research, Bartlesville, Okla., February 1985.

Golden Opportunities Knock Twice.

Kendall Motor Oil fights friction. And when your customers demand proof, the choice is Kendall Superb 100 that proved its friction-fighting strength. Kendall plated ordinary piston rings with pure gold and ran them in an engine for 5000 miles! A remarkable test!

And now you can offer your customers a choice of packages. Kendall in the traditional composite can, or Kendall in the new easy-to-open, easy-to-pour plastic Fun-L-Fil quarts.

And to help you even more, we've added new promotions, exciting packaging, eye-catching point of sale materials, more media dollars and dynamic new TV commercials.

Make this your year to profit from the Kendall gold rush.

After all, it isn't every day that golden opportunities knock twice.

PROTECTION
WORTH
ITS WEIGHT
IN GOLD.



Call area Retail Manager for complete details.

WEST
Tom Egan
Los Angeles, CA
213-637-9130

MIDWEST
Perry Singer
Springfield, IL
217-793-0896

Tom Platt
Chicago, IL
312-526-8275

SOUTH
Dale Witter
Atlanta, GA
404-393-3526

Tom Salata
Atlanta, GA
404-394-2912

EAST
John Yaros
Bradford, PA
814-368-6111

Fran Healy
Philadelphia, PA
215-326-8772

Scott Eyers
Bradford, PA
814-368-6111

David Gardner
Frederick, MD
301-695-5961

George Rooney
New York, NY
212-605-3928

REBATE!! Beginning May 20, 1985 and continuing until July 8, 1985, \$3.00 Manufacturer's Rebate on 12/1 quart cases of Superb 100 SAE 10W30 or Superb 100 SAE 10W40 in composite cans or plastic Fun-L-Fil bottles. Backing up this promotion, 10% FREE GOODS on Superb 100 SAE 10W30 or 10W40 Motor Oil. Call for complete details.

Kendall.

KENDALL REFINING CO.
Div. of Wilco Chemical Corporation
Bradford, PA 16701



Gasohol Consumption by States—1983

The following table, prepared by the Federal Highway Administration, contains a variety of caveats, as follows: the table shows gross gallons of gasohol reported by the distributors in each state. However, this total must not be considered a national total. In states where gasohol is taxed at the same rate as gasoline, the

gallage data is not reported separately and is commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, the totals should be considered minimums and not maximums.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama	1,621	1,937	2,572	2,217	2,253	2,589	2,401	2,742	2,537	2,729	2,843	3,196	29,637
Alaska	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona	—	79	11	350	115	150	27	12	22	6	—	—	772
Arkansas	291	1,310	1,064	1,018	943	1,031	1,200	1,419	1,219	718	1,534	884	12,631
California	51,741	37,266	44,414	33,571	44,036	46,127	48,346	45,017	32,421	26,845	37,229	33,837	480,850
Colorado	4,389	3,400	4,105	3,931	3,363	3,356	3,500	2,700	4,500	8,900	8,451	5,967	56,562
Connecticut	407	433	410	226	—	—	—	—	—	—	—	—	1,476
Delaware	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.	1	1	4	10	—	—	—	—	—	23	—	13	52
Florida	13,790	16,977	24,560	24,755	26,738	32,063	35,639	35,027	33,587	36,605	36,097	41,394	357,232
Georgia	29	20	29	2	21	20	21	5	2	7	1	1	158
Hawaii	—	—	—	—	—	—	—	—	—	—	—	—	—
Idaho	419	506	680	905	884	693	764	764	714	1,051	974	397	8,747
Illinois	18,552	16,944	21,552	18,816	19,872	20,856	22,392	19,248	20,472	20,712	18,624	21,960	240,000
Indiana	30,144	38,444	46,996	41,043	43,349	45,511	46,893	56,053	47,073	37,830	45,801	45,939	525,076
Iowa	35,042	39,061	41,574	44,966	41,540	50,782	44,968	44,585	42,018	41,401	39,524	44,763	510,206
Kansas	562	565	679	615	514	873	5,687	7,889	7,885	10,455	13,730	17,962	67,396
Kentucky	4,989	5,132	3,747	6,924	7,665	8,190	8,837	10,011	9,817	10,301	6,740	18,293	100,646
Louisiana	—	—	—	—	—	—	—	—	—	—	—	—	—
Maine	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland	4	10	7	4	—	7	—	16	6	6	8	6	74
Massachusetts	19	19	9	9	—	—	—	—	—	—	—	—	56
Michigan	27,091	24,763	28,765	47,935	64,206	68,160	69,247	63,614	43,312	40,573	42,193	46,132	565,991
Minnesota	434	103	141	494	760	194	201	161	196	307	339	248	3,578
Mississippi	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri	583	583	583	583	583	583	583	583	583	583	583	583	6,996
Montana	925	1,219	1,080	1,013	1,115	1,238	1,492	952	629	642	729	292	11,326
Nebraska	11,338	11,063	13,362	12,522	14,199	16,010	14,779	17,867	18,531	17,430	17,307	18,937	183,345
Nevada	61	36	54	60	72	—	—	—	—	—	—	—	283
New Hampshire	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico	13	31	601	587	673	1,945	2,035	3,610	3,696	3,714	2,792	6,892	26,589
New York	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina	367	311	347	442	282	245	138	107	42	181	178	272	2,912
North Dakota	105	531	383	320	331	457	352	364	334	118	655	490	4,440
Ohio	40,549	36,094	50,231	49,544	48,765	66,774	26,838	32,564	40,776	39,656	26,597	30,904	489,292
Oklahoma	27,862	23,203	1,171	60	—	3,958	3,945	4,274	3,690	2,241	2,027	3,273	75,704
Oregon	—	—	—	708	227	61	96	81	66	56	47	28	1,370
Pennsylvania	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island	—	—	—	—	—	—	—	—	—	—	—	—	—
South Carolina	161	227	188	82	116	121	46	24	5	14	20	14	1,018
South Dakota	1,676	1,767	2,291	1,856	2,593	2,942	3,178	3,259	3,021	2,892	3,015	3,457	31,947
Tennessee	—	—	—	—	—	—	—	—	—	—	—	—	—
Texas	21,327	25,423	40,522	46,102	51,026	42,249	31,376	17,846	2,140	1,412	1,274	1,394	282,091
Utah	—	—	—	—	—	—	—	—	—	—	—	—	—
Vermont	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia	3,594	2,457	4,849	3,702	3,993	3,126	5,185	3,394	3,528	3,391	4,073	4,921	46,213
Washington	673	1,078	1,076	545	856	810	525	543	457	259	324	797	7,943
West Virginia	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin	68	187	74	109	39	61	198	117	33	26	94	40	1,046
Wyoming	8	12	11	13	13	16	25	28	22	19	13	22	202
Total	298,835	291,192	338,142	346,039	381,142	421,176	380,914	374,876	323,314	311,103	313,816	353,306	4,133,857

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

Gasohol Consumption by States—1984

The table below, prepared by the Federal Highway Administration, shows gross gallons of gasohol reported by the distributors in each state. However, the agency says, the total must not be considered as a national total. In states where gasohol is taxed at the same rate as gasoline, the gallonage data are not

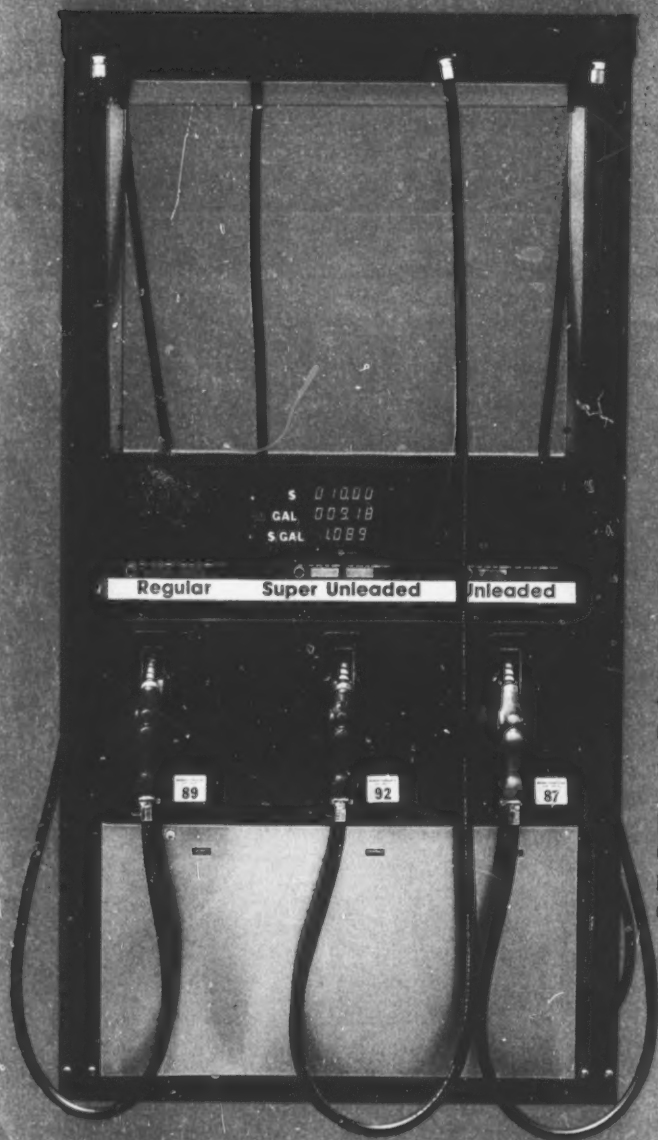
reported separately and are commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, this total should be considered a minimum, and not a national total. This also is a preliminary report.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama.....	2,833	2,572	3,177	3,022	2,945	2,805	2,452	2,616	2,378	2,728	3,593	3,778	34,899
Alaska.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Arkansas.....	1,474	1,175	1,180	1,216	2,006	2,112	3,595	3,328	4,255	3,117	2,765	2,648	28,871
California.....	30,904	25,334	39,806	47,294	57,430	54,982	28,166	26,642	23,173	20,355	21,652	26,099	401,837
Colorado.....	1,825	7,913	5,031	5,500	6,000	5,414	6,236	6,100	4,950	5,703	7,699	—	62,371
Connecticut.....	—	—	—	—	—	—	1,953	2,326	1,142	—	—	—	5,421
Delaware.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.....	12	7	12	13	4	7	—	3	2	3	—	—	63
Florida.....	34,110	43,879	43,025	38,697	40,284	34,978	48,794	43,873	41,995	45,542	45,726	47,848	508,751
Georgia.....	9	5	1	1	—	—	—	—	—	—	—	—	16
Hawaii.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Idaho.....	238	407	473	513	448	326	342	571	942	1,146	1,252	—	6,658
Illinois.....	22,031	22,031	34,294	36,745	41,682	54,262	52,082	—	—	—	—	—	263,127
Indiana.....	43,881	41,732	43,883	45,613	47,033	51,481	51,281	54,249	52,658	51,252	—	—	483,063
Iowa.....	39,114	34,190	39,565	39,284	41,743	39,707	41,227	41,826	33,266	35,749	35,057	36,500	457,228
Kansas.....	17,433	20,103	23,335	23,972	26,793	26,394	24,808	22,753	20,554	21,902	21,249	—	249,296
Kentucky.....	17,423	16,060	22,318	22,272	30,238	31,723	28,753	33,282	28,391	32,538	32,200	33,040	328,238
Louisiana.....	—	—	—	—	—	—	295	2,816	3,169	3,237	6,694	8,213	24,424
Maine.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland.....	5	6	7	6	9	5	7	8	6	5	7	11	82
Massachusetts.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Michigan.....	36,656	45,888	39,274	55,066	50,558	58,436	45,892	50,823	44,058	48,951	53,910	48,211	577,723
Minnesota.....	273	295	333	425	107	80	517	85	272	100	128	92	2,707
Mississippi.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Montana.....	579	323	937	1,230	847	923	809	1,281	598	776	—	—	8,303
Nebraska.....	16,170	15,095	15,659	15,809	17,552	18,739	17,639	18,952	17,283	18,297	18,606	18,654	208,455
Nevada.....	—	—	—	—	—	—	—	—	—	—	—	—	—
New Hampshire.....	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey.....	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico.....	4,178	4,572	11,078	6,916	3,612	1,898	3,108	3,552	5,974	4,383	7,223	—	56,494
New York.....	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina.....	361	477	522	639	1,033	1,318	1,495	1,631	1,372	5,607	9,296	10,286	34,037
North Dakota.....	203	589	111	325	881	535	505	104	938	543	145	590	5,469
Ohio.....	31,852	30,574	38,399	39,634	44,832	44,926	40,110	44,019	40,935	44,707	—	—	399,988
Oklahoma.....	3,322	2,810	2,488	2,738	2,520	974	1,256	1,984	1,805	1,357	952	1,414	23,620
Oregon.....	35	11	33	27	23	21	31	30	—	42	12	33	298
Pennsylvania.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island.....	—	—	—	—	—	—	—	—	—	—	—	—	—
South Carolina.....	8	11	1	29	16	12	13	—	15	14	15	20	154
South Dakota.....	2,856	2,628	3,246	3,216	3,674	3,591	3,811	4,078	3,153	3,882	3,715	—	37,850
Tennessee.....	7,094	8,342	11,351	11,663	7,561	9,441	10,461	9,001	9,149	4,904	11,280	9,515	109,762
Texas.....	1,132	2,521	6,643	19,689	18,879	20,151	21,262	18,431	21,460	23,459	26,117	27,408	207,152
Utah.....	2,740	3,287	4,203	4,605	5,176	5,232	373	18	81	147	—	—	25,862
Vermont.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia.....	4,172	3,969	8,215	6,702	9,718	14,572	13,458	15,336	13,791	13,959	13,874	13,852	131,618
Washington.....	646	610	512	338	1,066	473	1,290	901	958	883	686	780	9,143
West Virginia.....	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin.....	105	22	11	21	25	31	126	372	273	359	250	367	1,962
Wyoming.....	28	17	14	24	18	—	17	26	102	20	22	—	288
Total.....	323,702	337,455	399,137	433,244	464,713	485,549	452,164	411,017	379,098	395,667	324,125	289,359	4,695,230

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

Koppens New Calcu-Trim Model is Easy to Squeeze Into Your Budget.



Koppens new Calcu-trim model has a narrow design that requires only 4 feet on an island, where conventional dispensers simply wouldn't fit before.

It also has a lower price, which makes it just as easy to fit your budget. And besides the smaller size and attractive price, you'll also appreciate the fact that it's part of a complete Koppens system that can fit all your dispensing requirements.

While we've trimmed the size, we haven't cut down on features. You still get the profits from two, three or four products per side, to maximize customer throughput, along with performance and reliability you expect from every Koppens system. Features like micro processor controlled calculator, cash/credit display and selection button, solid state dual pulsers to insure smooth operation and accurate measurement. And stainless steel housing assure long life and durability.

Call today for more information on Koppens new affordable Calcu-trim models. Once you get the profit picture, you're sure to narrow your choice to Koppens.

**Koppens
Schlumberger**

Koppens 3601 Koppens Way, P.O. Box 6286, Chesapeake, VA 23323
Virginia 804-487-0077 Telex: 82-3602 Koppens Chpk. Cable: Koppens Chpk.

Diesel Sales for Highway Use

Diesel sales for motor vehicles—passenger cars and trucks—rose 7.2% in 1983 after 1982's relatively level performance. Sales amounted to 362.3-million bbl., or 15.2-billion gal. versus 14.2-billion gal. in the preceding year.

Off-highway sales declined slightly in 1983—about 1%. They amounted to 36.7-million bbl., or 1.5-billion gal. Sales in 1982 were 37.1-million bbl., or 1.6-billion gal. Off-highway consumption is primarily farm and construction equipment and conveniences.

(Add 000 bbl.)

PAD DISTRICTS	On-Highway			Off-Highway		
	1983	1982	% Change	1983	1982	% Change
District 1						
New England States						
Connecticut	3,203	2,698	18.7%	239	251	(4.8%)
Maine	1,731	1,564	10.7	231	243	(5.0)
Massachusetts	5,378	4,745	13.3	294	309	(4.9)
New Hampshire	800	744	8.0	162	170	(4.7)
Rhode Island	721	679	6.6	36	38	(5.3)
Vermont	722	352	105.1	164	173	(5.2)
Central Atlantic States						
Delaware	1,024	921	11.2	127	134	(5.2)
District of Columbia	475	436	8.9	9	9	—
Maryland	4,610	4,023	14.6	310	326	(4.9)
New Jersey	8,717	8,093	7.7	494	519	(4.8)
New York	8,948	8,353	7.1	589	619	(4.9)
Pennsylvania	16,048	15,296	4.9	2,031	2,136	(4.9)
Lower Atlantic States						
Florida	19,681	13,098	50.3	295	310	(4.8)
Georgia	13,321	11,801	12.9	182	191	(4.7)
North Carolina	10,869	9,789	11.0	281	296	(5.1)
South Carolina	6,213	5,682	9.3	187	197	(5.1)
Virginia	8,686	8,286	4.9	544	572	(4.9)
West Virginia	2,549	2,381	6.9	236	248	(4.8)
Total	113,696	96,941	14.9	6,411	6,741	(4.9)
District 2						
Illinois	13,344	13,744	(2.2)	791	842	(6.0)
Indiana	14,133	13,821	3.3	369	393	(6.1)
Iowa	6,800	6,525	4.2	450	479	(6.1)
Kansas	5,266	5,100	3.3	253	269	(5.9)
Kentucky	6,361	5,747	10.7	793	844	(6.0)
Michigan	8,803	8,181	7.6	340	362	(6.1)
Minnesota	6,753	6,341	6.5	402	428	(6.1)
Missouri	9,199	9,004	2.2	1,126	1,188	(6.9)
Nebraska	4,111	4,066	0.6	210	224	(6.3)
North Dakota	2,098	2,084	0.7	243	259	(6.2)
Ohio	17,659	17,092	3.3	3,085	3,283	(6.4)
Oklahoma	8,307	8,251	0.7	762	811	(6.0)
South Dakota	1,986	1,900	4.5	96	102	(5.9)
Tennessee	10,587	9,505	11.4	302	321	(6.9)
Wisconsin	7,711	7,072	9.0	433	461	(6.1)
Total	123,118	118,453	3.9	9,655	10,278	(6.0)
District 3						
Alabama	7,450	6,758	10.2	734	703	4.2
Arkansas	5,820	5,512	5.6	916	877	4.4
Louisiana	7,880	7,510	4.9	2,672	2,559	4.4
Mississippi	5,626	5,257	7.0	724	693	4.4
New Mexico	4,020	3,512	10.4	511	489	4.5
Texas	32,407	32,692	(0.9)	7,503	7,184	4.4
Total	63,203	61,241	3.2	13,060	12,505	4.4
District 4						
Colorado	4,597	4,211	9.2	828	596	5.5
Idaho	1,499	1,718	(12.7)	246	233	5.6
Montana	2,425	2,473	(1.9)	161	153	5.2
Utah	2,642	2,560	3.6	505	536	5.4
Wyoming	2,542	2,253	12.8	610	578	5.5
Total	13,705	13,205	3.8	2,210	2,095	5.5
District 5						
Alaska	1,174	596	97.0	416	424	(1.9)
Arizona	4,816	4,581	5.1	271	276	(1.8)
California	28,804	27,679	4.1	2,971	3,026	(1.8)
Hawaii	515	415	24.1	151	154	(1.9)
Nevada	2,043	1,977	3.3	174	177	(1.7)
Oregon	5,489	5,339	2.4	337	343	(1.7)
Washington	5,733	5,570	2.8	1,061	1,101	(1.8)
Total	48,554	46,168	5.2	5,401	5,501	(1.8)
U.S. Total	362,276	338,006	7.2%	36,737	37,118	(1.0%)

Source: Petroleum Supply Annual, Energy Information Division, June 1984.



Our carwash is designed so well, the cars wash themselves.

N/S Corporation looks at it logically: cars are made to move and a carwash is made to get cars clean; so why should we build a carwash that moves cars?

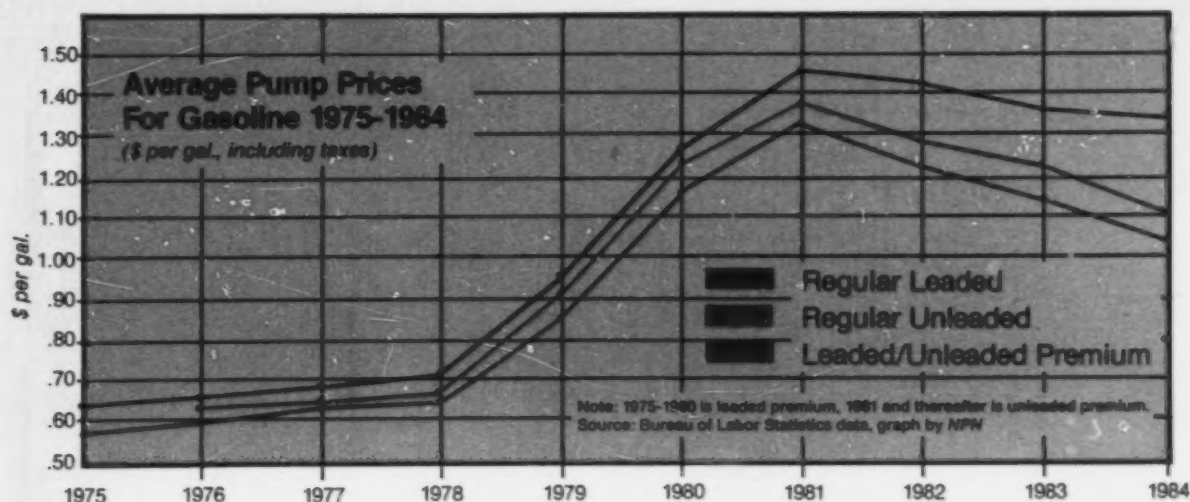
N/S has built a system that gets cars sparkling clean as they are being *driven* thru the wash. No chains, no guide rails, no special positioning. Just a leisurely cruise thru a really well

designed car washing system built by N/S Corporation.

There are no complicated controls or devices that break down and cost you money. Your customers will love driving their own cars thru the patented N/S system since no guiderails are required. And you both will appreciate the results: a sparkling clean car for just a few cents and a few minutes of time.

If you are looking for a machine to clean cars efficiently and economically, the one you are looking for is being manufactured by N/S Corporation: machinery so well-designed, the cars wash themselves.





Retail Gasoline Prices for Selected Areas—1978-1984

(In \$ per gal., including appropriate federal, state and local taxes, and representative of full service, self-service and mini-service pumps and stations. Although single-city identifications are used in the table below, each is actually a Standard Metropolitan

Statistical Area or a Standard Consolidated Area as defined by the Office of Management and Budget and normally used by the Bureau of Labor Statistics, Census Bureau, etc.).

Area	1984		1983		1982		1981		1980		1979		1978	
	Lead	Unl.	Lead	Unl.	Lead	Unl.	Lead	Unl.	Lead	Unl.	Lead	Unl.	Lead	Unl.
U.S. City Average (a)	\$1.137	\$1.212	\$1.157	\$1.241	\$1.222	\$1.296	\$1.311	\$1.378	\$1.191	\$1.245	\$1.057	\$1.093	\$1.027	\$1.070
Anchorage, Alaska	1.204	1.294	1.253	1.339	1.380	1.446	1.408	1.465	1.241	1.275	.921	.952	.744	.767
Atlanta, Ga.	1.110	1.225	1.143	1.248	1.234	1.319	1.328	1.397	1.197	1.251	.843	.890	.624	.668
Baltimore, Md.	1.092	1.164	1.244	1.296	1.288	1.335	1.334	1.389	1.204	1.251	.844	.891	.613	.666
Boston, Mass.	1.078	1.175	1.155	1.225	1.234	1.283	1.337	1.391	1.199	1.241	.857	.899	.623	.680
Buffalo, N.Y.	1.173	1.249	1.222	1.288	1.246	1.306	1.336	1.394	1.235	1.280	.899	.948	.644	.687
Chicago, Ill.	1.211	1.284	1.223	1.298	1.264	1.321	1.344	1.410	1.246	1.304	.925	.979	.680	.730
Cincinnati, Ohio	1.153	1.218	1.187	1.257	1.217	1.293	1.275	1.345	1.154	1.206	.842	.882	.618	.655
Cleveland, Ohio	1.130	1.214	1.175	1.248	1.269	1.327	1.304	1.385	1.160	1.203	.839	.884	.621	.665
Dallas-Ft. Worth, Texas	1.072	1.163	1.081	1.158	1.140	1.209	1.245	1.307	1.132	1.186	.789	.833	.579	.617
Denver-Boulder, Colo.	1.049	1.153	1.091	1.197	1.197	1.273	1.259	1.330	1.150	1.217	.838	.886	.612	.663
Detroit, Mich.	1.236	1.276	1.227	1.280	1.247	1.304	1.335	1.395	1.242	1.303	.891	.947	.643	.696
Honolulu, Hawaii	1.366	1.443	1.400	1.462	1.472	1.542	1.409	1.567	1.298	1.355	.937	.976	.759	.764
Houston, Texas	1.015	1.116	1.040	1.132	1.143	1.212	1.261	1.313	1.139	1.183	.794	.835	.567	.613
Kansas City, Mo.-Kan.	1.082	1.142	1.155	1.226	1.195	1.262	1.237	1.298	1.137	1.190	.843	.886	.604	.644
Los Angeles, Calif.	1.102	1.206	1.166	1.215	1.232	1.318	1.337	1.409	1.213	1.271	.892	.943	.644	.691
Miami, Fla.	1.126	1.215	1.207	1.326	1.257	1.364	1.319	1.389	1.186	1.235	.841	.892	.611	.661
Milwaukee, Wisc.	1.147	1.202	1.190	1.224	1.245	1.286	1.273	1.329	1.139	1.198	.819	.864	.595	.631
Minneapolis, St. Paul, Minn.	1.171	1.223	1.211	1.284	1.253	1.328	1.294	1.360	1.175	1.231	.860	.901	.618	.654
New York, N.Y.	1.116	1.189	1.181	1.257	1.249	1.319	1.355	1.413	1.241	1.286	.882	.927	.632	.675
NE Pennsylvania	1.137	1.204	1.157	1.208	1.197	1.242	1.306	1.353	1.178	1.218	.837	.879	.610	.650
Philadelphia, Pa.	1.141	1.213	1.149	1.210	1.188	1.255	1.309	1.365	1.192	1.233	.855	.904	.618	.658
Pittsburgh, Pa.	1.150	1.238	1.147	1.233	1.234	1.312	1.356	1.409	1.205	1.242	.857	.893	.628	.663
Portland, Ore.	1.116	1.222	1.121	1.230	1.257	1.337	1.317	1.381	1.193	1.226	.870	.907	.636	.681
St. Louis, Mo.-Ill.	1.086	1.142	1.111	1.164	1.151	1.213	1.230	1.299	1.145	1.208	.851	.897	.607	.656
San Diego, Calif.	1.162	1.212	1.157	1.253	1.240	1.339	1.323	1.408	1.215	1.280	.881	.932	.636	.691
San Fran.-Oakland, Calif.	1.156	1.302	1.154	1.290	1.280	1.353	1.355	1.436	1.243	1.310	.899	.961	.661	.717
Seattle-Everett, Wash.	1.178	1.239	1.145	1.182	1.227	1.271	1.335	1.401	1.211	1.253	.877	.917	.650	.677
Washington, DC	1.203	1.269	1.232	1.288	1.256	1.304	1.334	1.393	1.224	1.276	.853	.906	.651	.702
Region (b)														
Northeast	1.142	1.204	1.181	1.248	1.238	1.298	1.344	1.396	1.220	1.260	.870	.913	.631	.672
North Central	1.156	1.233	1.191	1.261	1.233	1.298	1.303	1.370	1.183	1.244	.861	.910	.628	.671
South	1.105	1.192	1.132	1.217	1.196	1.272	1.293	1.360	1.172	1.223	.831	.863	.611	.654
West	1.139	1.220	1.132	1.238	1.233	1.325	1.323	1.405	1.201	1.267	.879	.936	.643	.695

(a) The grades are regular in both cases.

(b) Regions are the four U.S. Census Bureau regions.

Source: Bureau of Labor Statistics, Department of Commerce; 1984 data averaged by NPN.

'84 Retail Gasoline Prices—Selected Areas

(In \$ per gal., including appropriate federal, state and local taxes, and representative of full service, self-service and mini-service pumps and stations. Although single-city identifications are used in the table below, each is

actually a Standard Metropolitan Statistical Area or a Standard Consolidated Area as defined by the Office of Management and Budget and normally used by the Bureau of Labor Statistics, Census Bureau, etc.)

Gasoline—All Types

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	\$1.200	\$1.193	\$1.194	\$1.211	\$1.221	\$1.214	\$1.197	\$1.184	\$1.189	\$1.196	\$1.193	\$1.170	\$1.197
Anchorage, Alaska	1.300	1.295	1.272	1.281	1.252	1.255	1.253	1.250	1.249	1.249	1.250	1.249	1.281
Atlanta, Ga.	1.190	1.215	1.220	1.221	1.212	1.208	1.198	1.191	1.195	1.192	1.187	1.189	1.200
Baltimore, Md.	1.190	1.180	1.183	1.186	1.184	1.179	1.168	1.144	1.152	1.154	1.150	1.148	1.169
Boston, Mass.	1.175	1.170	1.181	1.178	1.176	1.165	1.156	1.152	1.155	1.156	1.153	1.147	1.164
Buffalo, N.Y.	1.256	1.249	1.244	1.240	1.239	1.237	1.229	1.212	1.214	1.215	1.215	1.203	1.229
Chicago, Ill.	1.270	1.273	1.275	1.289	1.290	1.281	1.275	1.260	1.263	1.265	1.260	1.254	1.272
Cincinnati, Ohio	1.218	1.227	1.235	1.239	1.242	1.236	1.218	1.204	1.215	1.198	1.148	1.138	1.204
Cleveland, Ohio	1.204	1.196	1.197	1.208	1.224	1.214	1.193	1.185	1.190	1.193	1.186	1.175	1.197
Dallas-Fort Worth, Texas	1.137	1.127	1.124	1.136	1.136	1.137	1.138	1.181	1.189	1.187	1.171	1.164	1.152
Denver-Boulder, Colo.	1.078	1.112	1.120	1.135	1.134	1.121	1.092	1.085	1.105	1.101	1.094	1.062	1.104
Detroit, Mich.	1.270	1.284	1.285	1.297	1.312	1.288	1.259	1.251	1.279	1.291	1.284	1.263	1.280
Honolulu, Hawaii	1.468	1.464	1.446	1.459	1.477	1.497	1.497	1.498	1.409	1.404	1.394	1.384	1.450
Houston, Texas	1.093	1.093	1.094	1.106	1.105	1.109	1.102	1.147	1.148	1.144	1.131	1.110	1.115
Kansas City, Mo.-Kan.	1.105	1.124	1.122	1.151	1.165	1.154	1.135	1.107	1.083	1.087	1.075	1.061	1.114
Los Angeles, Calif.	1.186	1.153	1.159	1.218	1.258	1.225	1.193	1.130	1.154	1.211	1.215	1.198	1.180
Miami, Fla.	1.214	1.217	1.221	1.229	1.230	1.229	1.216	1.202	1.205	1.205	1.204	1.185	1.213
Milwaukee, Wisc.	1.218	1.173	1.201	1.217	1.212	1.203	1.183	1.168	1.184	1.195	1.198	1.167	1.192
Minneapolis-St. Paul, Minn.	1.214	1.208	1.204	1.224	1.225	1.223	1.213	1.206	1.205	1.205	1.204	1.192	1.210
New York, N.Y.	1.219	1.221	1.215	1.213	1.212	1.208	1.201	1.180	1.185	1.185	1.178	1.178	1.198
Northeast Pennsylvania	1.204	1.195	1.188	1.180	1.191	1.183	1.186	1.176	1.178	1.301	1.194	1.190	1.196
Philadelphia, Pa.	1.227	1.216	1.209	1.212	1.214	1.217	1.208	1.201	1.205	1.209	1.198	1.192	1.209
Pittsburgh, Pa.	1.243	1.231	1.228	1.236	1.246	1.246	1.238	1.227	1.225	1.219	1.215	1.212	1.230
Portland, Ore.	1.181	1.145	1.147	1.231	1.240	1.235	1.201	1.168	1.178	1.199	1.208	1.206	1.195
St. Louis, Mo.	1.130	1.132	1.142	1.167	1.165	1.161	1.146	1.128	1.130	1.128	1.130	1.120	1.140
San Diego, Calif.	1.227	1.201	1.201	1.255	1.285	1.266	1.194	1.171	1.187	1.232	1.248	1.241	1.226
San Francisco, Calif.	1.268	1.247	1.260	1.307	1.334	1.324	1.288	1.251	1.255	1.295	1.301	1.291	1.285
Seattle-Everett, Wash.	1.209	1.163	1.146	1.214	1.246	1.248	1.245	1.215	1.230	1.250	1.258	1.256	1.223
Washington, D.C.	1.305	1.305	1.294	1.295	1.296	1.212	1.286	1.275	1.274	1.268	1.263	1.259	1.278

Gasoline—Leaded Regular

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	\$1.131	\$1.216	\$1.123	\$1.145	\$1.154	\$1.147	\$1.129	\$1.116	\$1.120	\$1.127	\$1.124	\$1.109	\$1.137
Anchorage, Alaska	1.245	1.238	1.208	1.199	1.194	1.197	1.187	1.195	1.197	1.189	1.191	1.189	1.204
Atlanta, Ga.	1.095	1.118	1.122	1.133	1.134	1.127	1.114	1.098	1.104	1.100	1.095	1.079	1.110
Baltimore, Md.	1.112	1.109	1.106	1.110	1.108	1.102	1.091	1.088	1.078	1.077	1.074	1.072	1.092
Boston, Mass.	1.093	1.088	1.098	1.099	1.094	1.085	1.070	1.062	1.064	1.083	1.080	1.055	1.078
Buffalo, N.Y.	1.203	1.196	1.191	1.183	1.186	1.180	1.172	1.154	1.155	1.157	1.156	1.145	1.173
Chicago, Ill.	1.201	1.209	1.209	1.224	1.236	1.244	1.208	1.194	1.199	1.201	1.195	1.188	1.211
Cincinnati, Ohio	1.181	1.171	1.168	1.179	1.187	1.189	1.159	1.147	1.161	1.119	1.111	1.091	1.193
Cleveland, Ohio	1.143	1.135	1.136	1.146	1.163	1.149	1.122	1.114	1.116	1.120	1.113	1.105	1.130
Dallas-Ft. Worth, Texas	1.059	1.048	1.048	1.057	1.056	1.055	1.057	1.099	1.104	1.104	1.091	1.086	1.072
Denver-Boulder, Colo.	1.022	1.059	1.069	1.085	1.084	1.069	1.035	1.028	1.049	1.051	1.037	999	1.049
Detroit, Mich.	1.226	1.238	1.237	1.254	1.266	1.244	1.217	1.208	1.238	1.249	1.239	1.216	1.236
Honolulu, Hawaii	1.396	1.387	1.372	1.381	1.401	1.425	1.421	1.419	1.310	1.306	1.298	1.285	1.366
Houston, Texas	985	987	993	1.006	1.007	1.006	1.004	1.051	1.050	1.048	1.032	1.009	1.015
Kansas City, Mo.-Kan.	1.075	1.093	1.092	1.122	1.137	1.125	1.108	1.079	1.047	1.049	1.035	1.013	1.082
Los Angeles, Calif.	1.110	1.086	1.072	1.133	1.173	1.137	1.057	1.041	1.068	1.122	1.129	1.112	1.132
Miami, Fla.	1.128	1.130	1.135	1.144	1.144	1.143	1.129	1.113	1.114	1.114	1.114	1.099	1.128
Milwaukee, Wisc.	1.106	1.125	1.154	1.170	1.185	1.155	1.136	1.120	1.135	1.146	1.140	1.116	1.147
Minneapolis-St. Paul, Minn.	1.175	1.170	1.163	1.185	1.185	1.182	1.172	1.168	1.165	1.165	1.165	1.153	1.171
New York, N.Y.	1.140	1.144	1.137	1.137	1.138	1.132	1.124	1.091	1.096	1.091	1.081	1.082	1.116
Northeast Pennsylvania	1.186	1.155	1.144	1.148	1.148	1.148	1.142	1.128	1.130	1.117	1.115	1.110	1.137
Philadelphia, Pa.	1.159	1.150	1.143	1.147	1.150	1.151	1.138	1.133	1.135	1.141	1.139	1.123	1.141
Pittsburgh, Pa.	1.175	1.170	1.144	1.154	1.162	1.163	1.152	1.142	1.143	1.136	1.130	1.125	1.150
Portland, Ore.	1.093	1.066	1.069	1.161	1.171	1.159	1.119	1.084	1.097	1.120	1.129	1.123	1.116
St. Louis, Mo.-Ill.	1.075	1.079	1.089	1.118	1.111	1.108	1.092	1.075	1.074	1.023	1.077	1.066	1.086
San Diego, Calif.	1.167	1.138	1.136	1.192	1.227	1.206	1.129	1.105	1.119	1.167	1.163	1.176	1.162
San Francisco, Calif.	1.145	1.122	1.135	1.188	1.215	1.206	1.156	1.117	1.112	1.160	1.166	1.154	1.156
Seattle-Everett, Wash.	1.160	1.112	1.094	1.172	1.201	1.201	1.201	1.171	1.187	1.207	1.214	1.215	1.178
Washington, D.C.	1.235	1.232	1.210	1.210	1.212	1.213	1.200	1.189	1.189	1.184	1.184	1.180	1.203

Source: Bureau of Labor Statistics, Department of Commerce, Consumer and Energy Prices, 1984.

Gasoline—Unleaded Regular

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	\$1.216	\$1.209	\$1.210	\$1.227	\$1.236	\$1.229	\$1.212	\$1.196	\$1.203	\$1.209	\$1.207	\$1.193	\$1.212
Anchorage, Alaska	1.353	1.329	1.312	1.301	1.285	1.288	1.283	1.281	1.273	1.276	1.283	1.283	1.294
Atlanta, Ga.	1.218	1.247	1.252	1.253	1.231	1.225	1.219	1.215	1.218	1.217	1.210	1.193	1.225
Baltimore, Md.	1.194	1.184	1.177	1.181	1.180	1.174	1.163	1.139	1.149	1.151	1.145	1.144	1.164
Boston, Mass.	1.183	1.178	1.182	1.187	1.185	1.177	1.169	1.163	1.168	1.169	1.166	1.159	1.175
Buffalo, N.Y.	1.274	1.267	1.262	1.258	1.255	1.254	1.248	1.232	1.236	1.238	1.237	1.224	1.249
Chicago, Ill.	1.284	1.282	1.282	1.301	1.301	1.304	1.286	1.271	1.278	1.279	1.273	1.268	1.284
Cincinnati, Ohio	1.236	1.244	1.244	1.250	1.258	1.255	1.235	1.223	1.232	1.182	1.152	1.127	1.218
Cleveland, Ohio	1.220	1.209	1.210	1.220	1.238	1.232	1.212	1.206	1.211	1.214	1.206	1.193	1.214
Dallas-Fort Worth, Texas	1.148	1.139	1.135	1.145	1.148	1.149	1.148	1.193	1.202	1.197	1.178	1.169	1.163
Denver-Boulder, Colo.	1.141	1.172	1.176	1.190	1.189	1.179	1.154	1.146	1.166	1.164	.999	1.156	1.153
Detroit, Mich.	1.267	1.285	1.267	1.299	1.313	1.286	1.255	1.245	1.275	1.286	1.281	1.256	1.276
Honolulu, Hawaii	1.465	1.461	1.441	1.454	1.471	1.490	1.489	1.492	1.406	1.397	1.382	1.372	1.443
Houston, Texas	1.097	1.098	1.099	1.108	1.109	1.112	1.102	1.145	1.146	1.140	1.126	1.105	1.116
Kansas City, Mo.-Kan.	1.138	1.158	1.154	1.182	1.195	1.186	1.165	1.138	1.104	1.108	1.094	1.080	1.142
Los Angeles, Calif.	1.217	1.177	1.180	1.241	1.260	1.251	1.172	1.150	1.174	1.234	1.234	1.218	1.206
Miami, Fla.	1.217	1.280	1.225	1.233	1.234	1.231	1.210	1.203	1.207	1.207	1.208	1.181	1.215
Minneapolis, Wisc.	1.218	1.181	1.211	1.227	1.223	1.215	1.193	1.177	1.195	1.204	1.199	1.176	1.202
Minneapolis-St. Paul, Minn.	1.226	1.222	1.217	1.237	1.238	1.237	1.228	1.217	1.219	1.216	1.215	1.202	1.223
New York, N.Y.	1.218	1.211	1.208	1.202	1.200	1.197	1.187	1.168	1.176	1.170	1.166	1.164	1.189
Northeast Pennsylvania	1.218	1.211	1.204	1.209	1.210	1.213	1.203	1.194	1.197	1.199	1.198	1.194	1.204
Philadelphia, Pa.	1.232	1.229	1.211	1.218	1.218	1.219	1.213	1.205	1.209	1.213	1.197	1.195	1.213
Pittsburgh, Pa.	1.252	1.239	1.235	1.243	1.256	1.254	1.246	1.234	1.232	1.222	1.226	1.220	1.238
Portland, Ore.	1.220	1.172	1.168	1.250	1.263	1.260	1.229	1.198	1.202	1.226	1.236	1.237	1.222
St. Louis, Mo.-Ill.	1.135	1.135	1.146	1.170	1.169	1.163	1.148	1.127	1.131	1.128	1.130	1.119	1.142
San Diego, Calif.	1.212	1.184	1.185	1.241	1.275	1.254	1.170	1.155	1.176	1.223	1.241	1.229	1.212
San Francisco, Calif.	1.287	1.259	1.275	1.322	1.352	1.341	1.306	1.268	1.274	1.313	1.318	1.310	1.302
Seattle-Everett, Wash.	1.205	1.158	1.411	1.207	1.242	1.244	1.237	1.202	1.221	1.242	1.252	1.247	1.239
Washington, D.C.	1.284	1.283	1.279	1.281	1.281	1.279	1.272	1.262	1.263	1.257	1.247	1.243	1.269

Gasoline—Unleaded Premium

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	\$1.369	\$1.361	\$1.362	\$1.375	\$1.380	\$1.377	\$1.370	\$1.355	\$1.360	\$1.365	\$1.364	\$1.354	\$1.366
Anchorage, Alaska	1.451	1.441	1.421	1.412	1.405	1.406	1.410	1.410	1.420	1.421	1.421	1.460	1.426
Atlanta, Ga.	1.343	1.364	1.372	1.398	1.358	1.360	1.352	1.354	1.357	1.354	1.352	1.323	1.354
Baltimore, Md.	1.337	1.338	1.329	1.329	1.321	1.322	1.312	1.287	1.287	1.294	1.280	1.286	1.311
Boston, Mass.	1.338	1.338	1.337	1.334	1.333	1.326	1.373	1.318	1.320	1.322	1.322	1.318	1.331
Buffalo, N.Y.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Chicago, Ill.	1.510	1.511	1.510	1.519	1.522	1.528	1.329	1.299	1.491	1.498	1.485	1.486	1.474
Cincinnati, Ohio	1.401	1.405	1.405	1.408	1.410	1.418	1.387	1.375	1.385	1.398	1.398	1.278	1.374
Cleveland, Ohio	1.346	1.347	1.350	1.365	1.373	1.359	1.352	1.336	1.342	1.344	1.343	1.335	1.349
Dallas-Fort Worth, Texas	1.284	1.275	1.275	1.292	1.294	1.294	1.297	1.336	1.347	1.347	1.332	1.326	1.308
Denver-Boulder, Colo.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Detroit, Mich.	1.481	1.488	1.489	1.490	1.499	1.486	1.466	1.470	1.489	1.498	1.496	1.499	1.488
Honolulu, Hawaii	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Houston, Texas	1.272	1.265	1.258	1.275	1.269	1.279	1.273	1.320	1.322	1.322	1.314	1.294	1.289
Kansas City, Mo.-Kan.	NA	NA	NA	NA	NA	NA	NA	NA	1.198	1.206	1.219	1.209	NA
Los Angeles, Calif.	1.367	1.334	1.340	1.402	1.421	1.386	1.329	1.290	1.329	1.386	1.382	1.373	1.383
Miami, Fla.	1.336	1.341	1.342	1.350	1.353	1.353	1.340	1.330	1.334	1.335	1.335	1.319	1.339
Minneapolis, Wisc.	NA	1.373	1.377	1.389	1.388	1.371	1.363	1.354	1.370	1.378	1.370	1.358	1.370
Minneapolis-St. Paul, Minn.	1.362	1.365	1.380	1.380	1.399	1.399	1.388	1.383	1.382	1.384	1.383	1.393	1.386
New York, N.Y.	1.385	1.384	1.358	1.357	1.351	1.352	1.348	1.324	1.326	1.321	1.320	1.322	1.342
Northeast Pennsylvania	1.340	1.347	1.339	1.338	1.330	1.331	1.339	1.338	1.337	1.336	1.335	1.329	1.335
Philadelphia, Pa.	1.380	1.345	1.348	1.386	1.347	1.354	1.347	1.336	1.343	1.334	1.340	1.339	1.345
Pittsburgh, Pa.	1.378	1.369	1.367	1.376	1.378	1.383	1.379	1.367	1.364	1.370	1.358	1.355	1.370
Portland, Ore.	1.375	1.347	1.358	1.424	1.420	1.425	1.404	1.372	1.385	1.396	1.399	1.400	1.392
St. Louis, Mo.-Ill.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
San Diego, Calif.	1.371	1.357	1.358	1.395	1.427	1.407	1.372	1.353	1.367	1.400	1.419	1.415	1.387
San Francisco, Calif.	1.448	1.431	1.447	1.481	1.501	1.490	1.472	1.444	1.453	1.487	1.492	1.483	1.469
Seattle-Everett, Wash.	1.342	1.308	1.294	1.344	1.371	1.377	1.373	1.356	1.361	1.379	1.383	1.379	1.356
Washington, D.C.	1.457	1.460	1.455	1.456	1.456	1.451	1.446	1.437	1.431	1.476	1.417	1.414	1.446

(NA—Data not adequate for publication)

Source: Bureau of Labor Statistics, Department of Commerce, Consumer and Energy Prices, 1984.

Residential No. 2 Prices for Selected States

(\$ gal., excluding taxes)

	Conn.	Me.	Mass.	N.H.	R.I.	Vt.	Del.	D.C.	Md.	N.J.	N.Y.	Pa.	Va.
1978 Average	50.1	48.6	48.8	50.3	50.7	50.8	47.8	50.7	49.2	49.6	50.1	48.8	49.1
1979 Average	72.0	68.8	70.9	72.5	72.8	72.5	68.2	74.2	70.1	71.0	71.2	69.8	70.4
1980 Average	96.3	96.3	97.8	100.4	101.1	101.5	95.4	102.6	97.9	97.9	98.2	96.4	98.5
1981 Average	121.7	120.4	121.3	123.7	123.8	125.4	117.3	127.4	121.4	121.5	123.2	118.1	120.5
1982 Average	118.3	115.5	117.6	117.4	120.1	120.1	111.3	124.5	117.1	117.4	120.5	113.7	117.7

1983													
January	119.5	109.0	116.3	111.6	116.2	121.5	110.5	122.8	115.4	115.7	120.6	113.7	116.0
February	115.8	103.7	113.2	105.5	112.2	116.9	108.2	119.7	112.6	110.4	117.6	109.6	112.0
March	108.3	97.4	105.4	100.8	106.8	109.6	103.9	115.3	106.2	104.6	110.2	104.0	106.9
April	104.5	99.5	104.4	100.9	108.8	110.6	103.0	113.1	107.9	104.4	106.9	101.8	106.7
May	105.9	101.6	107.0	102.6	109.6	111.2	104.6	112.9	108.6	105.5	108.2	103.3	107.2
June	104.3	102.6	106.9	101.2	112.0	112.8	107.3	114.7	108.3	104.6	110.5	102.2	106.8
July	104.2	102.6	105.3	104.3	109.1	112.3	107.8	112.8	107.2	104.5	109.9	101.3	107.4
August	103.9	105.6	105.4	103.5	107.9	111.7	102.5	113.3	107.0	105.5	110.0	101.6	107.7
September	103.8	103.6	106.2	104.0	108.1	111.0	103.5	113.9	106.1	106.1	110.5	102.8	106.1
October	104.3	102.9	105.6	103.1	108.0	109.4	103.5	113.4	108.7	105.4	110.3	103.3	104.8
November	104.1	101.8	106.1	101.5	108.7	109.8	103.7	113.5	108.8	104.6	110.2	103.7	104.9
December	105.6	102.2	106.1	103.7	109.4	110.0	105.5	114.7	109.2	106.7	110.9	104.6	105.2
1983 Average	109.1	102.8	109.1	104.1	110.5	112.9	106.0	117.0	110.3	107.9	112.1	105.8	108.7

1984													
January	115.7	110.2	114.4	114.0	113.7	116.6	114.8	122.0	115.6	114.1	118.3	112.9	111.4
February	121.7	112.6	119.7	117.8	117.5	118.9	118.4	128.6	121.9	119.5	124.3	117.4	117.5
March	114.5	103.3	113.1	108.8	111.7	115.1	111.1	122.6	116.2	113.5	117.0	110.9	112.6
April	113.4	103.3	112.4	107.7	110.7	113.3	109.9	119.9	115.6	110.6	116.0	107.8	110.8
May	112.5	102.7	112.5	108.8	111.4	112.2	109.0	119.5	113.0	109.1	114.5	105.8	111.1
June	110.6	103.7	110.5	104.5	110.8	112.8	107.2	116.3	109.9	107.1	115.0	103.3	108.7
July	107.4	102.5	107.3	101.9	109.3	108.6	103.7	116.5	109.0	104.9	112.8	99.7	107.2
August	104.7	98.0	105.5	98.6	106.0	108.0	103.7	109.8	105.2	103.6	110.2	99.6	105.2
September	105.4	99.1	106.0	101.0	105.9	106.9	102.1	109.9	106.7	104.3	109.3	100.9	105.9
October	106.2	101.9	106.9	102.2	107.4	108.0	103.5	111.8	107.5	105.7	111.9	101.5	106.7
November	107.2	100.6	107.2	102.7	106.5	107.5	103.3	111.9	108.2	105.2	111.7	102.9	107.1
December	106.4	97.9	107.0	103.1	107.1	106.4	102.8	112.9	107.1	104.9	111.3	103.2	107.6
1984 Average	112.1	103.9	111.6	108.4	111.4	111.9	109.6	118.8	113.5	111.0	115.5	107.9	110.5

	W.Va.	Ill.	Ind.	Mich.	Minn.	Ohio	Wisc.	Idaho	Ark.	Ore.	Wash.	U.S. ave.
1978 Average	46.2	46.5	48.5	47.9	47.8	47.4	44.7	43.6	53.2	45.8	48.6	49.0
1979 Average	65.1	68.8	72.7	70.9	72.4	68.6	67.3	62.1	68.2	68.0	69.7	70.4
1980 Average	92.2	95.8	99.6	97.8	99.9	91.9	91.5	91.6	97.8	97.3	100.8	97.4
1981 Average	115.0	114.9	118.5	118.3	118.4	113.2	109.1	110.4	118.0	111.4	116.5	119.4
1982 Average	109.3	110.9	114.3	113.9	115.1	110.2	107.8	110.4	117.4	111.6	117.6	116.0

1983												
January	105.6	103.8	105.7	110.6	107.8	107.9	108.5	109.1	114.6	113.8	117.7	115.0
February	104.7	99.5	102.8	108.5	101.8	104.4	104.5	104.8	NA	107.8	114.3	111.6
March	99.2	96.6	95.7	103.7	96.5	98.2	96.8	99.6	110.7	101.4	109.0	105.1
April	97.5	97.7	96.8	102.5	100.5	95.8	97.1	99.0	106.6	99.1	106.0	103.5
May	96.1	100.3	98.2	102.7	101.9	96.5	98.7	99.2	106.0	99.0	105.5	104.8
June	97.3	100.2	98.2	110.7	102.4	96.1	98.7	96.7	105.0	99.4	105.4	106.0
July	94.9	98.6	99.4	105.3	102.6	97.3	99.0	99.3	105.8	97.8	105.2	105.0
August	96.1	100.7	98.9	102.2	104.4	95.2	99.2	96.1	105.1	98.7	104.0	104.9
September	100.7	102.5	101.4	103.9	103.7	101.2	100.7	96.9	106.2	100.5	105.6	105.7
October	100.6	101.0	101.5	105.8	104.8	100.2	101.8	99.5	106.1	101.4	108.3	106.0
November	100.5	100.8	100.7	105.4	104.4	101.0	100.4	99.5	105.5	102.1	106.4	106.0
December	101.5	99.6	101.1	106.8	104.2	102.1	100.5	100.3	105.5	101.8	106.1	106.7
1983 Average	101.8	100.4	100.7	106.4	103.1	101.3	101.2	101.8	106.8	103.6	109.0	107.8

1984												
January	108.5	104.7	106.0	107.3	106.6	104.6	101.5	100.1	104.1	100.5	103.6	112.0
February	109.9	105.9	107.3	108.0	102.8	105.7	102.8	101.3	106.5	100.9	103.8	116.9
March	104.9	102.3	100.6	105.6	105.1	101.7	101.7	97.2	107.3	100.9	104.6	111.3
April	101.6	100.3	103.4	104.8	103.9	101.9	101.4	96.2	107.3	100.6	105.0	109.8
May	98.9	102.3	102.4	105.2	105.3	103.1	101.0	98.1	107.2	99.5	104.2	108.4
June	99.5	101.6	105.9	103.3	104.2	101.7	100.5	93.8	107.8	98.2	103.3	107.2
July	96.2	99.4	101.4	102.6	105.1	101.8	100.5	93.1	107.2	97.1	100.4	104.8
August	96.6	98.9	100.3	101.8	104.5	99.5	100.0	97.4	107.3	94.9	99.7	103.3
September	96.9	98.6	100.7	103.2	103.5	100.1	98.8	98.4	105.0	95.9	100.4	103.6
October	96.3	97.1	100.9	103.0	103.0	101.2	100.7	99.4	107.8	96.5	100.9	104.9
November	99.6	95.8	102.3	103.5	103.1	100.8	101.0	97.9	107.8	97.6	101.3	105.3
December	99.1	94.5	101.0	103.4	102.8	99.3	99.1	98.8	NA	97.3	100.6	104.8
1984 Average	102.0	100.1	103.2	105.0	104.1	102.1	101.0	98.5	106.9	99.3	102.7	109.1

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984.

Gasoline Prices by Grades and Months

(U.S. averages, retail, including taxes, in ¢ per gal.)

		Leaded Regular	Unleaded Regular	Unleaded Premium (a)	Average for All Types
1984	January	113.1	121.6	136.9	120.0
	February	112.5	120.9	136.1	119.3
	March	112.5	121.0	136.2	119.4
	April	114.5	122.7	137.5	121.1
	May	115.4	123.6	138.0	122.1
	June	114.7	122.9	137.7	121.4
	July	112.9	121.2	137.0	119.7
	August	111.6	119.6	135.5	118.4
	September	112.0	120.3	136.0	118.9
	October	112.7	120.9	136.5	119.5
	November	112.4	120.7	136.4	119.3
	December	110.9	119.3	135.4	117.9
	Average	112.9	121.2	136.6	119.8
1983	January	114.6	122.8	137.6	121.3
	February	109.9	118.7	133.8	117.0
	March	106.4	115.1	130.8	113.5
	April	113.1	121.5	136.0	119.8
	May	117.7	125.9	139.7	124.3
	June	119.7	127.7	141.1	126.1
	July	120.7	128.8	142.1	127.2
	August	120.3	128.5	141.9	126.9
	September	118.9	127.4	141.0	125.7
	October	117.2	125.5	139.5	123.9
	November	115.6	124.1	138.4	122.4
	December	114.6	123.1	137.6	121.5
	Average	115.7	124.1	138.3	122.5
1982	January	128.5	135.8	146.6	134.1
	February	126.0	133.4	144.8	131.8
	March	120.6	128.4	140.8	126.8
	April	114.8	122.5	135.1	121.0
	May	116.6	123.7	135.5	122.4
	June	124.2	130.9	141.8	129.6
	July	126.3	133.1	144.3	131.8
	August	125.4	132.3	143.9	131.0
	September	123.6	130.8	142.9	129.5
	October	121.9	129.5	142.1	128.0
	November	120.7	128.3	142.1	126.8
	December	118.1	126.0	139.4	124.4
	Average	122.2	129.6	141.5	128.1
Average	1981 (b)	131.1	137.8	141.5 (a)	128.1
	1980	119.1	124.5	128.1 (a)	122.1
	1979	85.7	90.3	92.2 (a)	88.2
	1978	62.6	67.0	69.4 (a)	65.2
	1977	62.2	65.6	67.4 (a)	NA
	1976	59.0	61.4	63.6 (a)	NA
	1975	56.7	NA	60.9 (a)	NA
	1974	53.2	NA	56.9 (a)	NA

(a) In January, 1984, this series was switched from leaded premium to unleaded premium to reflect changing market conditions. The monthly columns for 1983 and 1982 have been revised to unleaded status.

(b) Data for 1981 and earlier are for leaded premium. Beginning in September 1981, Bureau of Labor Statistics changed the weights used in the calculation of average motor gasoline prices. In the fourth column above, gasohol is included and unleaded premium is weighted more heavily.

Source: Department of Energy, Monthly Energy Review, March 1985.

Wholesale Price Trends Through 1983

Year	Refinery products in eight refinery markets representing total U.S.					Crude		
	Motor gasoline ¢ gal.	Kero- sine ¢ gal.	Light fuel ¢ gal.	Heavy fuel ¢ gal.	Average 4 products		8 areas	Products vs. crude
					¢ gal.	\$/bbl.	\$/bbl.	\$/bbl.
1984 (a)	77.87	84.75	79.62	59.14	72.86	30.60	25.880	4.72
1983	83.75	85.12	80.05	57.30	75.33	31.64	26.190	5.51
1982	92.90	97.18	91.95	57.80	82.44	34.62	28.520	6.10
1981	101.63	101.03	97.20	61.17	88.75	37.28	31.770	5.51
1980	87.40	80.26	78.21	44.43	72.77	30.56	21.190	9.38
1979	56.84	56.50	54.47	33.63	49.50	20.79	12.640	8.15
1978	39.22	37.23	35.66	23.00	33.72	14.16	9.000	5.16
1977	36.99	35.81	34.41	25.87	32.21	13.95	8.570	5.38
1976	33.82	31.67	30.38	21.66	29.55	12.41	8.141	4.26
1975	30.27	27.41	26.09	22.03	27.03	11.35	7.560	3.79
1973	14.72	14.08	12.61	8.45	12.49	5.25	3.885	1.365
1971	12.70	12.90	10.75	7.76	10.94	4.59	3.385	1.205
1970	12.33	12.43	10.45	6.14	10.20	4.28	3.177	1.103
1965	11.52	11.28	9.04	4.81	9.12	3.83	2.864	0.966

(a) Preliminary

Source: Independent Petroleum Assn. of America. Product figures reflect trends in prices but not the actual sales realizations for producers or refiners.

Supplier Gasoline Prices, by Type of Seller

(¢ per gal., excluding taxes)

Year Month	Major Refiners			Other Refiners and Gas Plant Operators			Average		
	Sales to End-Users			Sales to End-Users			Sales to End-Users		
	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale
1978 Average ..	49.4¢	45.2¢	43.8¢	48.2¢	45.8¢	42.1¢	48.9¢	45.1¢	43.4¢
1979 Average ..	72.8	68.0	64.3	71.0	67.5	61.8	72.1	67.9	63.7
1980 Average ..	105.6	98.7	95.1	103.0	97.8	91.3	104.6	98.5	94.1
1981 Average ..	117.0	109.4	107.5	114.2	108.4	103.2	115.9	109.2	106.4
1982 Average ..	108.2	101.1	98.3	105.6	100.2	94.3	107.2	100.9	97.3
1983									
January	99.0	93.2	89.6	96.3	90.9	85.5	98.0	92.9	88.5
February	94.4	88.5	86.2	91.9	86.9	83.0	93.4	88.3	85.4
March	91.7	84.8	83.7	90.0	86.4	80.5	91.1	84.9	82.9
April	94.9	88.8	87.0	97.7	87.8	84.8	95.9	88.7	86.5
May	96.5	91.4	90.9	96.9	89.7	88.6	98.0	91.3	90.4
June	99.6	93.4	92.1	97.6	92.2	89.3	98.9	93.2	91.5
July	100.2	95.1	93.1	98.2	93.2	89.6	99.5	94.9	92.3
August	99.8	94.2	92.3	98.1	93.6	88.9	99.2	94.1	91.5
September	98.8	91.8	91.0	95.5	90.5	87.6	98.0	91.7	90.2
October	97.0	90.8	88.9	94.9	88.2	85.2	96.3	90.6	88.1
November	95.5	89.6	87.5	93.2	88.0	83.6	94.7	89.5	86.6
December	94.1	87.4	84.8	91.7	86.5	80.4	93.2	87.3	83.8
1983 Average ..	97.0	90.6	89.0	95.2	89.7	85.6	96.4	90.5	88.2
1984									
January	92.0	86.4	84.0	89.8	85.5	80.3	91.3	86.2	83.2
February	91.4	86.3	84.5	89.4	86.9	81.4	90.8	86.4	83.8
March	92.0	86.0	85.4	90.3	86.5	82.6	91.4	86.1	84.7
April	94.0	88.7	87.6	92.6	88.6	84.6	93.6	88.7	86.9
May	94.4	88.7	87.5	93.3	88.2	83.8	94.1	88.6	86.6
June	93.8	86.8	85.5	92.1	87.8	81.2	93.3	86.9	84.5
July	91.9	85.0	82.7	89.5	82.1	78.5	91.1	84.6	81.7
August	90.8	83.8	82.0	88.0	80.8	78.1	89.9	83.4	81.1
September	91.3	84.4	83.7	89.0	82.5	79.8	90.6	84.1	82.8
October	91.9	85.6	84.5	89.7	84.5	80.6	91.2	85.4	83.6
November	91.4	84.8	83.0	88.8	83.6	78.4	90.6	84.6	81.9
December	89.8	79.1	79.5	87.1	80.2	73.2	89.0	79.2	78.0
1984 Average ..	92.0	85.4	84.2	90.0	84.9	80.2	91.4	85.4	83.2

Supplier Gasoline Prices, by Grade and Type

(¢ per gal., excluding taxes)

Year Month	Leaded Regular			Unleaded Regular			Premium		
	Sales to End-Users			Sales to End-Users			Sales to End-Users		
	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale
1983									
January	92.8¢	90.8¢	85.4¢	99.8¢	93.5¢	89.8¢	110.4¢	98.1¢	96.7¢
February	88.4	86.1	82.5	95.1	89.0	86.7	106.0	94.3	93.7
March	85.7	82.2	80.0	92.6	86.7	84.3	104.7	91.6	91.3
April	91.1	86.7	83.6	97.7	89.4	87.9	106.1	93.6	94.4
May	93.0	88.8	87.3	99.6	93.2	91.8	109.3	97.1	98.6
June	93.6	90.7	88.3	100.6	94.7	93.0	110.4	98.2	99.7
July	94.1	92.7	89.1	101.2	95.7	93.7	110.3	99.5	100.7
August	94.2	92.0	88.3	100.7	94.5	92.7	110.1	99.0	99.9
September	92.9	89.8	87.0	99.4	91.9	91.4	109.4	96.7	98.3
October	91.0	88.6	84.9	97.7	90.8	89.2	107.8	95.6	96.1
November	89.2	87.0	83.3	96.2	90.0	87.8	106.6	94.4	94.8
December	87.5	84.6	80.3	94.6	88.4	84.8	105.2	94.3	92.3
1983 Average ..	91.2	88.1	85.0	98.0	91.5	89.5	108.0	96.1	96.4
1984									
January	85.6	83.7	79.5	92.5	87.0	84.3	101.4	94.4	91.7
February	84.9	83.9	80.3	91.9	87.0	85.0	101.7	95.3	92.0
March	85.4	83.4	81.3	92.5	87.4	85.9	102.5	94.5	92.8
April	87.6	86.0	83.3	94.5	89.7	88.2	104.3	96.9	95.1
May	88.1	85.7	82.9	94.9	90.0	87.8	104.5	97.4	95.0
June	87.2	84.3	80.7	94.1	87.7	85.7	103.7	94.8	92.7
July	84.7	81.8	78.0	91.8	85.3	82.6	101.9	92.2	90.0
August	83.4	80.6	77.3	90.6	84.0	82.1	101.5	92.2	89.5
September	83.9	81.5	78.9	91.3	84.8	83.8	101.5	93.0	91.2
October	84.6	82.4	79.7	91.8	86.6	84.5	102.0	93.6	92.0
November	83.8	81.6	77.8	91.0	85.5	82.9	101.1	91.9	90.6
December	81.8	74.5	73.5	89.3	82.0	78.9	99.9	89.8	87.2
1984 Average ..	85.1	82.4	79.5	92.2	86.4	84.2	102.1	93.7	91.6

(a) Through company-operated retail outlets.

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984, Published February 1985.

Supplier Product Prices For Resale

(¢ per gal., excluding taxes)

Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine- Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Distillate			No. 4 Fuel	Residual Fuel Oil	Propane (Consumer Grade)
						No. 2 Fuel Oil	No. 2 Diesel Fuel	Average			
1978 Average....	43.4¢	53.7¢	38.6¢	40.4¢	40.6¢	36.9¢	36.5¢	36.7¢	30.5¢	26.3¢	23.7¢
1979 Average....	63.7	72.1	66.0	62.4	58.3	56.9	57.4	57.1	47.0	39.9	29.1
1980 Average....	94.1	112.8	86.8	86.4	88.0	80.3	80.1	80.2	67.0	52.8	41.5
1981 Average....	106.4	125.0	101.2	106.6	107.1	97.6	97.2	97.4	78.3	66.3	48.6
1982 Average....	97.3	122.8	95.3	101.8	103.8	91.4	91.4	91.4	73.7	61.2	42.7
1983											
January.....	88.5	124.8	91.8	94.2	94.0	85.7	85.5	85.7	81.7	60.3	47.0
February.....	85.4	123.7	89.9	90.0	89.0	80.1	80.7	80.3	76.8	58.5	46.7
March.....	82.9	121.2	84.5	83.1	84.5	76.0	75.2	75.7	72.5	57.7	47.4
April.....	86.5	120.0	82.9	84.2	85.0	78.9	76.8	78.0	74.1	57.7	50.0
May.....	90.4	120.2	84.3	87.7	88.5	80.9	80.2	80.5	72.1	59.2	50.5
June.....	91.5	115.0	84.1	84.6	86.8	80.9	80.3	80.6	72.9	60.2	50.9
July.....	92.3	115.2	84.8	85.2	86.9	81.7	80.8	81.2	70.0	62.2	50.7
August.....	91.5	114.7	85.4	86.7	90.1	83.4	81.7	82.5	70.2	63.8	49.8
September.....	90.2	113.7	86.3	91.9	92.0	85.1	83.5	84.2	69.8	64.6	50.1
October.....	88.1	118.9	86.4	90.8	92.1	83.5	83.0	83.2	67.9	64.7	49.9
November.....	86.6	118.7	84.4	90.4	90.2	82.6	82.0	82.4	70.2	63.6	47.3
December.....	83.8	118.8	83.6	88.6	88.4	80.7	80.1	80.5	71.4	62.3	45.4
1983 Average....	88.2	117.8	85.4	89.2	89.6	81.5	80.8	81.2	72.6	60.9	48.4
1984											
January.....	83.2	116.7	86.4	95.9	92.5	87.5	82.6	85.9	72.0	64.8	47.7
February.....	83.8	116.5	86.5	100.4	94.8	89.2	84.5	87.3	71.6	67.5	47.4
March.....	84.7	117.1	84.6	91.5	89.1	81.3	81.0	81.2	75.5	64.5	45.3
April.....	86.9	116.8	84.2	90.7	88.6	82.8	80.8	81.9	72.7	66.2	44.6
May.....	86.6	117.1	84.3	90.9	89.3	83.2	81.9	82.5	70.4	66.0	44.4
June.....	84.5	116.8	84.2	88.1	90.5	82.4	81.9	82.1	70.1	67.2	44.1
July.....	81.7	117.2	82.8	87.6	91.6	79.4	79.3	79.4	68.0	65.0	42.3
August.....	81.1	116.7	81.0	86.0	85.3	77.8	77.7	77.7	65.7	63.6	43.2
September.....	82.8	116.8	81.7	88.8	85.6	80.0	78.4	79.2	67.9	64.5	44.8
October.....	83.6	116.4	82.9	88.9	88.2	80.8	80.0	80.4	67.8	65.1	46.1
November.....	81.9	114.8	81.4	88.0	87.5	79.4	79.0	79.3	71.7	64.6	45.6
December.....	78.0	114.0	80.1	86.4	86.0	77.1	77.0	77.1	70.6	64.6	43.0
1984 Average....	83.2	116.5	83.0	91.6	89.2	82.1	80.3	81.3	70.7	65.4	45.0

Supplier Product Prices to End-Users

(¢ per gal., excluding taxes)

Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine- Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Distillate			No. 4 Fuel	Residual Fuel Oil	Propane (Consumer Grade)
						No. 2 Fuel Oil	No. 2 Diesel Fuel	Average			
1978 Average....	48.4¢	51.6¢	38.7¢	42.1¢	40.9¢	40.0¢	37.7¢	39.6¢	31.1¢	29.8¢	33.5¢
1979 Average....	71.3	68.9	54.7	58.5	57.2	51.8	58.5	55.1	47.9	43.6	35.7
1980 Average....	103.5	108.4	86.8	90.2	83.4	78.8	81.8	80.4	68.2	60.7	48.2
1981 Average....	114.7	130.3	102.4	112.3	103.9	91.4	99.5	95.8	79.7	75.6	56.5
1982 Average....	106.0	131.2	96.3	108.9	102.3	90.5	94.2	92.5	75.0	67.6	59.2
1983											
January.....	97.1	129.2	94.5	104.5	100.8	100.9	89.2	91.9	81.0	64.2	72.7
February.....	92.5	127.2	92.6	101.4	95.4	97.0	84.0	86.6	77.3	62.0	71.7
March.....	89.8	126.6	90.6	97.1	91.2	93.0	78.0	80.1	76.6	60.9	68.1
April.....	94.7	125.2	88.8	93.4	92.0	89.1	78.8	80.2	77.9	61.0	68.6
May.....	96.6	125.4	87.8	93.8	94.4	89.5	81.8	82.5	75.7	63.2	72.2
June.....	97.8	125.6	86.3	90.0	97.9	87.3	81.5	82.0	74.7	64.7	67.3
July.....	98.8	125.1	85.6	89.0	99.9	85.1	82.0	82.3	75.2	65.9	66.4
August.....	98.4	125.9	85.5	90.8	99.0	86.1	83.0	83.3	75.8	67.7	68.9
September.....	96.9	124.2	86.1	92.7	99.5	88.0	84.8	85.2	75.3	69.0	74.9
October.....	95.4	124.7	86.0	98.9	98.0	89.0	84.2	84.7	73.0	68.7	69.6
November.....	93.9	124.5	85.8	100.0	95.4	90.1	83.5	84.5	77.4	67.4	72.8
December.....	92.4	124.4	85.5	96.6	92.5	92.1	82.2	84.0	75.8	67.2	76.4
1983 Average....	95.4	125.5	87.8	96.1	96.2	91.6	82.6	83.9	76.6	65.1	70.9
1984											
January.....	90.6	123.9	85.8	106.8	95.3	97.7	84.4	87.5	82.1	69.0	76.8
February.....	90.2	123.7	86.5	117.9	99.9	104.6	87.4	91.2	80.8	70.4	76.3
March.....	90.7	123.8	85.6	111.3	93.8	94.7	83.2	85.6	80.2	68.5	76.4
April.....	92.9	124.4	85.1	105.8	93.5	91.9	82.4	83.7	77.9	69.1	76.5
May.....	93.4	123.9	85.2	102.4	93.7	90.9	83.2	84.1	80.8	69.5	70.4
June.....	92.5	124.6	84.5	94.3	92.6	86.9	84.0	84.4	80.7	71.0	70.6
July.....	90.4	124.3	84.1	90.6	91.7	84.3	81.3	81.6	79.6	69.0	69.6
August.....	89.2	123.2	83.4	92.8	88.4	82.8	79.7	80.1	74.2	67.1	71.9
September.....	89.7	123.7	83.1	99.2	89.9	84.3	80.2	80.7	79.4	67.5	73.4
October.....	90.5	123.3	83.2	102.7	90.5	87.3	81.6	82.3	79.4	67.8	74.1
November.....	89.9	119.3	82.4	106.1	90.7	87.7	80.7	81.8	79.6	67.9	73.8
December.....	87.7	121.9	82.2	101.4	88.5	88.1	79.4	81.1	79.8	67.7	70.0
1984 Average....	90.6	123.4	84.2	103.6	92.7	91.6	82.3	83.7	79.6	68.7	73.6

Supplier Prices of No. 2 Distillate Fuel Oil

(¢ per gal., excluding taxes)

Year Month	Sales to End-Users						Sales for Resale
	To Residential Consumers	To Commercial/ Institutional Consumers	To Industrial Consumers	Sales Through Company- Operated Retail Outlets(a)	To Other End-Users(b)	Average	
1983							
January	115.0¢	94.2¢	95.0¢	97.3¢	94.9¢	103.2¢	86.0¢
February	111.6	87.7	89.3	95.8	90.6	98.1	81.3
March	105.1	82.1	84.5	91.6	85.7	90.5	76.1
April	103.5	82.7	85.0	96.1	87.2	90.3	78.9
May	104.8	84.8	87.7	94.4	89.7	90.4	81.4
June	106.0	84.8	87.4	95.2	89.4	89.9	81.7
July	105.0	84.9	87.4	94.0	90.2	89.4	82.1
August	104.9	85.6	88.7	94.1	90.3	90.0	83.2
September	105.7	87.5	89.8	94.2	91.4	92.1	84.8
October	106.0	87.3	89.3	93.7	91.3	92.8	83.9
November	106.0	87.2	88.7	93.2	89.8	93.7	83.0
December	106.7	87.6	87.4	92.4	87.7	95.6	80.7
1983 Average ..	107.8	86.3	88.3	94.3	89.7	93.3	81.8
1984							
January	112.0	90.3	91.2	95.6	90.8	99.6	86.1
February	116.9	92.1	92.6	96.0	92.7	101.1	87.9
March	111.3	87.5	88.5	93.3	88.8	96.3	82.0
April	109.8	85.7	88.0	93.0	90.3	93.0	82.6
May	108.4	86.3	88.1	93.0	92.1	91.9	83.1
June	107.2	86.2	87.5	92.7	91.2	90.6	82.7
July	104.8	83.6	85.7	91.5	88.7	88.0	80.1
August	103.3	82.3	85.0	90.8	86.5	87.1	78.5
September	103.6	83.0	85.3	90.7	88.1	88.6	79.9
October	104.9	84.2	85.7	90.5	89.3	89.9	81.0
November	105.3	83.4	85.0	89.8	87.6	90.8	79.8
December	104.8	82.7	83.5	89.3	84.6	91.0	77.8
1984 Average ..	109.1	85.7	87.0	92.0	89.2	92.6	81.9

(a) No. 2 Diesel Fuel only; (b) Agriculture, utilities, etc.

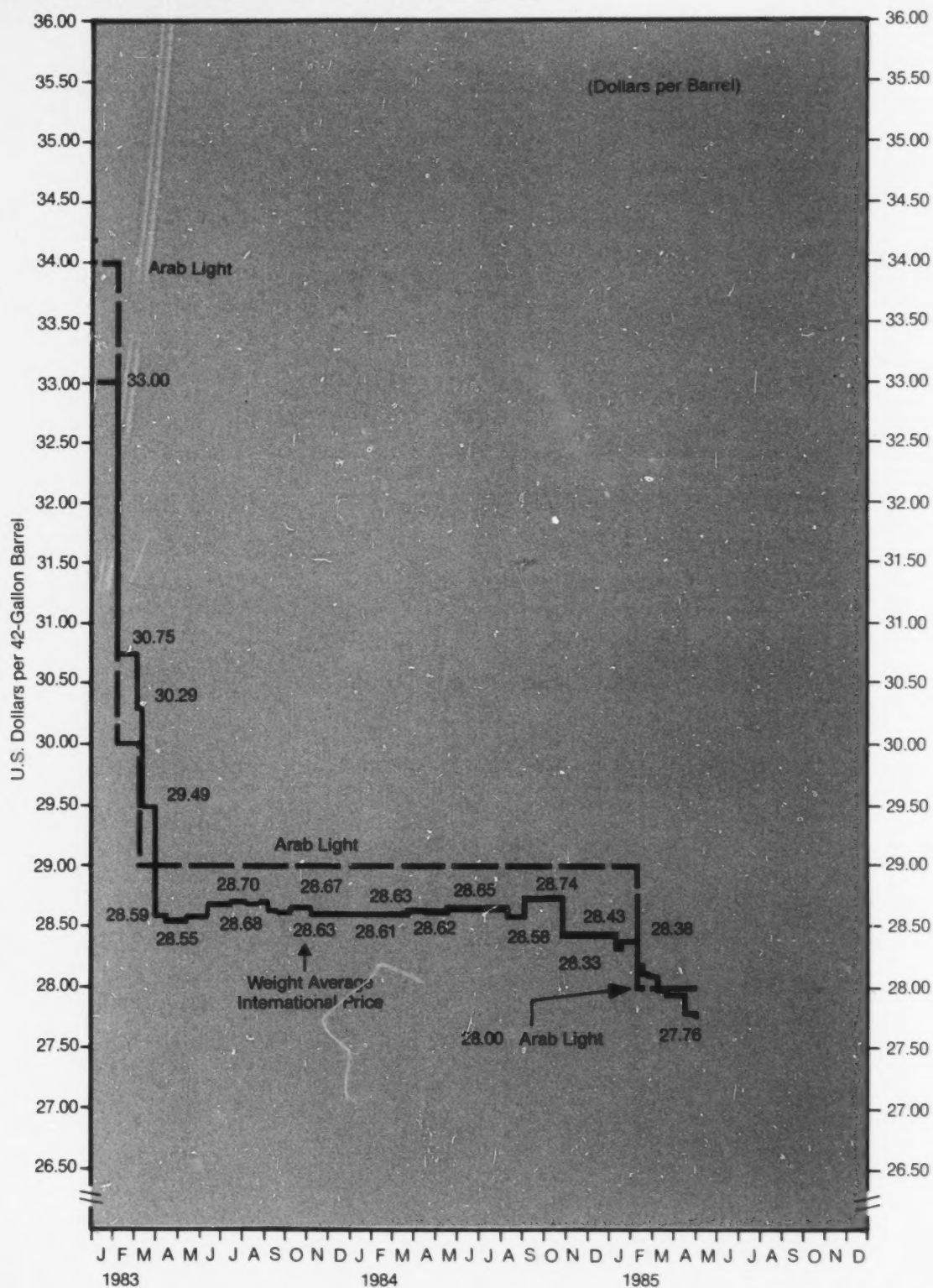
Supplier Prices of Residual Fuel Oil

(¢ per gal., excluding taxes)

Year Month	Residual Fuel Oil, Sulfur Content Less Than or Equal to 1%		Residual Fuel Oil, Sulfur Content Greater Than 1%		Average	
	Sales to End-Users	Sales for Resale	Sales to End-Users	Sales for Resale	Sales to End-Users	Sales for Resale
1978 Average ..	31.4¢	29.3¢	27.5¢	24.5¢	29.8¢	26.3¢
1979 Average ..	46.8	45.0	38.9	36.6	43.6	39.9
1980 Average ..	67.5	60.8	52.3	47.9	60.7	52.8
1981 Average ..	82.9	74.8	67.3	62.2	75.6	66.3
1982 Average ..	74.7	69.5	61.1	57.2	67.6	61.2
1983						
January	70.5	65.0	60.1	57.0	64.2	60.3
February	66.0	63.0	58.5	55.7	62.0	58.5
March	66.2	60.0	57.0	55.9	60.9	57.7
April	64.3	60.1	58.7	56.5	61.0	57.7
May	66.9	62.6	59.7	57.8	63.2	59.2
June	69.2	63.2	60.1	58.5	64.7	60.2
July	70.4	65.2	61.4	60.5	65.9	62.2
August	71.6	66.7	63.2	62.0	67.7	63.8
September	72.6	67.0	65.3	63.3	69.0	64.6
October	72.1	68.8	64.9	62.6	68.7	64.7
November	70.7	66.5	64.4	62.2	67.4	63.6
December	72.0	67.3	63.1	60.2	67.2	62.3
1983 Average ..	69.5	64.3	61.1	59.1	65.1	60.9
1984						
January	73.6	71.0	64.6	62.3	69.0	64.8
February	75.1	71.4	65.8	65.7	70.4	67.5
March	73.1	70.5	64.7	61.9	68.5	64.5
April	73.1	69.2	66.5	64.7	69.1	66.2
May	72.7	68.3	67.4	65.0	69.5	66.0
June	73.2	69.8	68.9	66.1	71.0	67.2
July	71.5	66.8	66.7	64.0	69.0	65.0
August	69.5	65.6	65.0	62.7	67.1	63.6
September	70.0	65.9	64.9	63.8	67.5	64.5
October	70.8	66.8	65.8	64.3	67.8	65.1
November	70.4	66.8	65.8	63.6	67.9	64.6
December	70.5	67.5	65.6	63.3	67.7	64.6
1984 Average ..	72.0	68.5	65.9	63.9	68.7	65.4

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984, published in February 1985.

World Crude Oil Prices (1)



¹Internationally traded oil only. Average price (FOB) weighted by estimated export volume.
As of 04/23/85 Weekly Petroleum Status Report/Energy Information Administration.

Spot Market Product Prices

(\$ per bbl.)

		Motor Gasoline		Gasoil/Heating Oil		Residual Fuel Oil	
		Rotterdam (98-Octane)	New York (89-Octane)	Rotterdam (0.5% Sulfur)	New York (0.2% Sulfur)	Rotterdam (1% Sulfur)	New York (1% Sulfur)
1985							
Jan.	4	27.72	28.27	29.35	29.76	28.22	28.25
	11	27.43	28.58	31.09	30.87	28.30	28.25
	18	27.02	28.50	32.23	32.76	28.67	29.25
Feb.	25	26.84	29.23	31.76	31.19	28.75	29.45
	1	26.96	30.43	32.30	31.19	28.15	29.25
	8	27.43	31.29	32.30	31.71	28.75	29.50
Mar.	15	28.42	31.29	34.04	31.92	29.20	29.50
	22	29.01	31.84	34.04	32.24	28.97	29.50
	1	28.78	31.50	31.43	32.34	27.62	29.50
Apr.	8	28.83	31.61	32.37	32.76	26.42	28.65
	15	29.42	31.61	32.10	33.12	26.42	27.35
	22	30.48	33.60	32.10	35.81	24.62	27.00
May	29	30.59	33.71	32.50	35.39	25.30	26.75
	5	31.94	34.65	32.10	34.13	25.37	26.65
	12	33.35	34.65	31.56	32.97	25.30	26.25
Jun.	19	33.24	34.23	30.83	32.66	25.08	26.00
	26	33.00	34.34	31.03	32.66	23.94	25.75
1984							
Jan.	6	30.72	32.57	33.78	35.28	28.15	29.75
	13	30.25	32.34	33.85	36.12	27.78	30.15
	20	31.65	34.17	34.38	41.79	28.00	30.25
Feb.	27	32.24	33.43	35.12	44.10	27.85	31.25
	3	31.48	34.69	34.79	42.42	28.23	31.50
	10	31.48	33.64	33.51	38.01	28.60	31.00
Mar.	17	31.48	33.85	33.04	34.23	28.53	30.75
	24	31.89	33.18	33.24	32.55	28.53	30.25
	2	33.59	34.86	33.71	33.08	28.53	29.25
Apr.	9	33.47	35.01	33.98	32.86	28.30	29.25
	16	33.82	34.69	34.38	32.55	28.30	29.00
	23	33.29	34.38	34.12	33.50	28.15	28.75
May	30	32.77	35.87	34.12	34.76	28.00	28.75
	6	33.06	35.26	34.12	35.91	28.60	29.25
	13	33.06	35.15	33.31	36.02	28.15	29.40
Jun.	20	32.53	34.08	32.91	36.12	27.85	29.40
	27	32.36	33.73	32.84	36.02	27.85	29.40
	4	31.65	33.96	32.17	35.80	27.85	29.25
Jul.	11	31.59	33.75	31.97	36.12	28.00	29.25
	18	32.59	33.85	33.18	35.70	28.53	29.40
	25	33.18	33.52	33.18	34.12	28.45	29.85
Aug.	1	33.35	33.10	33.71	34.23	28.45	30.00
	8	33.00	32.68	33.04	33.81	27.78	29.90
	15	32.12	32.05	31.70	32.34	27.85	29.75
Sep.	22	31.18	31.10	31.23	32.13	27.40	29.25
	29	30.13	32.05	30.70	32.30	27.03	28.75
Oct.	6			Not available.			
	13	31.36	32.03	30.76	32.28	27.18	29.00
	20	30.66	31.29	30.16	31.92	27.18	28.75
Nov.	27	29.95	30.98	29.09	30.66	27.18	28.50
	3	29.31	32.24	29.76	31.71	27.18	27.75
	10	30.54	32.09	30.50	31.71	27.18	27.50
Dec.	17	31.24	32.02	30.83	32.02	27.18	27.75
	24	31.13	32.13	32.10	32.97	27.18	28.00
	31	31.13	32.34	31.97	32.55	27.25	28.65
Jan.	7	31.01	32.76	31.17	33.08	27.18	28.75
	14	30.95	32.82	31.84	33.39	27.48	28.75
	21	30.95	33.18	32.37	33.81	28.00	28.75
Feb.	28	30.95	33.01	32.84	34.23	28.00	28.70
	5	30.77	32.91	33.11	34.02	28.30	28.75
	12	30.89	33.54	32.31	33.08	28.60	28.75
Mar.	19	29.95	30.68	29.83	30.24	28.38	28.75
	26	29.60	30.68	31.70	32.34	27.78	28.25
Apr.	2	29.60	31.46	31.37	32.34	27.78	28.25
	9	29.43	30.64	32.44	32.55	27.78	28.25
	16	29.43	30.03	32.10	32.02	28.60	28.70
May	23	29.37	29.65	32.31	32.13	28.68	28.90
	30	28.78	28.92	29.96	31.50	27.93	28.80
Jun.	7	28.84	29.25	30.43	32.13	27.93	28.80
	14	28.19	28.37	29.96	31.18	27.93	29.00
	21	27.73	28.10	29.76	30.34	28.23	29.00
Jul.	28			Not available.			

International Prices for Gasoline and Fuel Oil

(U.S. dollars per gal. for gasoline; per 42-gal. bbl. for fuel oil)

Country	1/1/84				7/1/83				1/1/83			
	Gasoline		Fuel Oil		Gasoline		Fuel Oil		Gasoline		Fuel Oil	
	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.
WESTERN HEMISPHERE												
Argentina.....	1.40	NR	27.51	18.69	1.16	NR	25.58	14.53	.90	1.00	17.05	10.87
Bolivia.....	.45	.76	19.07	NA	.47	.66	17.49	NA	.47	.66	17.49	NR
Brazil.....	2.00	NA	24.04	26.83	2.21	NA	21.90	24.41	2.47	NR	36.39	26.84
Canada.....	1.44	1.33	NA	NA	1.42	1.54	NA	NA	1.34	1.46	NR	33.61
Chile.....	1.70	1.79	59.62	45.00	1.74	1.84	60.89	42.57	NR	2.47	36.39	28.64
Colombia.....	.84	.85	NA	NA	.85	.96	NA	NA	.95	1.08	NR	NR
Dominican Republic.....	NA	2.30	47.04	30.24	NA	2.30	47.04	30.24	NA	NA	NA	NA
Ecuador.....	.55	.73	NA	9.24	.62	.83	NA	8.30	.91	1.21	NR	8.91
Jamaica.....	2.21	2.27	62.53	32.11	1.76	1.81	49.42	28.13	2.12	2.17	55.15	34.03
Mexico.....	.69	.94	18.37	4.96	.61	.89	15.00	2.40	.51	.76	10.71	36.40
Panama Republic.....	2.14	2.28	NA	NA	2.14	2.28	NA	NA	2.18	2.32	NR	NR
Paraguay.....	3.08	4.02	61.11	43.72	3.08	4.02	61.11	43.72	4.81	6.01	68.77	55.52
Peru.....	.97	1.09	28.90	26.54	1.04	1.07	NA	30.98	1.01	1.21	33.02	29.43
United States.....	1.13	1.37	38.30	30.91	1.21	1.42	36.71	29.57	1.15	1.35	42.42	27.05
Uruguay.....	2.49	3.05	NA	29.76	2.28	2.81	NA	22.50	NA	NA	NA	NA
Venezuela.....	.26	.88	2.40	1.78	.26	.88	2.40	1.78	.26	.88	2.40	1.78
WESTERN EUROPE												
Austria.....	2.16	2.26	NA	30.56	2.18	2.29	NA	26.90	2.40	2.49	NR	29.46
Belgium.....	2.17	2.24	45.53	33.21	2.43	2.51	44.51	32.01	2.53	2.64	54.77	36.71
Denmark.....	2.37	2.40	56.10	41.75	2.53	2.56	56.42	40.23	2.83	2.86	70.29	45.03
Finland.....	2.35	2.44	70.88	25.68	2.39	2.48	72.12	26.10	NR	NR	NR	NR
France.....	2.08	2.24	45.90	29.17	2.25	2.39	50.62	27.81	2.51	2.68	60.73	30.57
Germany, West.....	1.80	1.88	36.02	26.40	1.89	2.00	37.38	24.21	2.14	2.27	46.84	30.17
Greece.....	1.70	1.85	38.00	21.63	2.05	2.22	45.83	26.09	2.47	2.68	NR	30.37
Italy.....	2.85	2.96	57.47	30.98	2.81	2.93	56.03	30.11	3.16	3.30	64.21	37.22
Luxembourg.....	1.79	1.85	44.18	30.11	NA	NA	NA	NA	1.85	1.92	45.73	27.51
Netherlands.....	2.24	2.30	NA	NA	2.44	2.52	NA	NA	2.36	2.44	NR	36.05
Norway.....	2.42	2.49	NA	NA	NA	NA	NA	NA	2.67	2.73	60.94	38.90
Portugal.....	2.56	2.70	65.54	24.19	2.61	2.71	62.28	23.42	2.98	3.15	62.48	28.07
Spain.....	2.10	2.30	58.85	23.75	1.96	2.17	54.18	24.39	2.38	2.69	65.93	30.76
Sweden.....	2.02	2.07	1.03	1.03	2.00	2.05	1.03	1.18	2.18	2.24	50.19	44.31
Switzerland.....	NA	NA	NA	NA	2.22	2.15	38.75	27.42	2.29	2.37	43.25	28.43
Turkey.....	1.70	1.83	48.15	32.66	1.73	1.82	51.89	33.23	NR	NR	NR	NR
United Kingdom.....	NA	2.31	NA	NA	NA	2.31	NA	28.75	NR	NR	NR	NR
Yugoslavia.....	2.05	2.14	28.13	25.97	2.05	2.18	37.30	34.31	2.32	2.44	48.70	44.85
MIDDLE EAST												
Israel.....	NA	NA	NA	NA	2.05	2.26	63.50	29.05	2.18	2.37	67.89	30.78
Saudi Arabia.....	.17	.23	NA	NA	.18	.24	1.62	2.02	.18	.24	1.62	2.02
AFRICA												
Ethiopia.....	2.18	2.36	46.58	NA	2.18	2.36	45.58	NA	2.18	2.36	45.58	26.43
Ghana.....	.85	.97	19.58	21.68	.59	.69	16.04	16.93	3.42	3.73	58.03	43.39
Kenya.....	NA	NA	NA	NA	2.13	2.27	39.54	24.14	NA	NA	NA	NA
Morocco.....	2.32	2.42	32.09	30.21	2.56	2.57	NA	30.94	2.72	2.84	38.50	32.37
South Africa, Rep. of.....	2.50	2.57	78.27	46.94	NA	NA	NA	NA	2.14	2.17	68.67	37.86
Tunisia.....	1.53	1.63	NA	15.36	1.83	1.95	NA	18.40	1.82	1.94	NR	18.29
ASIA-PACIFIC												
Australia.....	2.00	2.05	62.32	40.45	1.72	1.77	57.63	35.97	1.81	1.85	60.69	38.43
Indonesia.....	1.33	1.52	35.19	31.99	1.73	2.16	32.94	28.39	1.76	2.19	28.98	28.98
Japan.....	2.38	2.55	63.60	35.86	2.44	2.60	64.26	35.11	2.70	2.85	70.88	41.07
Korea, South.....	NA	NA	NA	NA	NA	NA	NA	NA	3.32	4.47	NR	43.56
Pakistan.....	1.69	1.84	NA	18.30	1.73	1.88	NA	18.76	1.61	1.76	NR	15.02
Philippines.....	1.70	1.75	48.00	38.66	1.46	1.51	NA	NA	2.03	2.14	NR	NR
Singapore.....	2.12	2.42	45.75	NA	1.76	1.86	NA	46.28	1.83	2.03	49.68	26.18
Sri Lanka.....	NA	2.10	60.58	23.90	NA	2.10	60.58	23.90	NR	1.79	49.49	28.39
Thailand.....	1.77	1.92	46.21	24.73	1.82	2.07	48.21	27.52	1.88	2.21	49.22	30.35

NR—not reported; NA—not available.

Source: International Energy Annual 1983, Energy Information Administration, published November 1984; Gasoline and fuel oil prices are for the capitals of each city involved, except the U.S. which is the national average for the month given. All gasoline prices are pump retails and include taxes and custom duties.

International Prices of Diesel Fuel and Household Kerosine

(U.S. cents per gal.)

(U.S. cents per gal.)

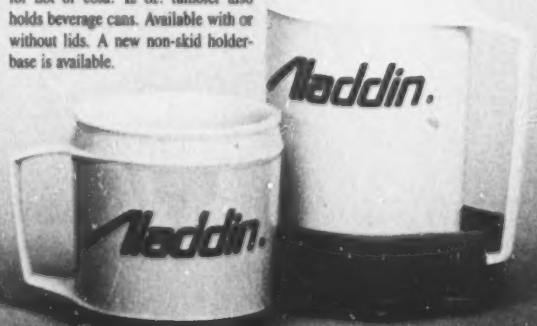
Country	Auto Diesel		Household Kerosine	
	1/1/84	7/1/83	1/1/84	7/1/83
Western Hemisphere				
Argentina	.66	.61	.73	.71
Bolivia	.45	.44	.11	.15
Brazil	1.41	NA	1.41	NA
Canada	1.38	1.42	1.35	1.35
Chile	1.42	1.45	1.48	1.49
Colombia	.84	.85	.75	.85
Dominican Republic	.96	.96	1.15	1.15
Ecuador	.35	.31	.22	.18
Jamaica	1.51	1.20	.76	.75
Mexico	.44	.36	.29	.21
Panama Republic	1.33	1.33	1.20	1.20
Paraguay	1.54	1.54	1.66	1.66
Peru	.66	.80	.40	.49
United States	.96	.94	1.07	.89
Uruguay	1.54	1.16	1.55	1.18
Venezuela	.27	.27	.09	.09
Western Europe				
Austria	2.04	2.14	3.58	3.51
Belgium	1.71	1.76	1.11	1.11
Denmark	1.44	1.48	1.35	1.35
Finland	1.73	1.76	1.33	1.36
France	1.67	1.84	NA	NA
Germany, West	1.74	1.83	NA	NA
Greece	.90	1.09	1.02	1.23
Italy	1.41	1.43	1.45	1.51
Luxembourg	1.47	NA	1.12	NA
Netherlands	1.50	1.50	NA	1.40
Norway	1.35	NA	1.38	NA
Portugal	1.56	1.48	1.56	1.48

Country	Auto Diesel		Household Kerosine	
	1/1/84	7/1/83	1/1/84	7/1/83
Spain				
Spain	1.40	1.29	1.45	1.34
Sweden				
Sweden	1.21	1.24	1.29	1.26
Switzerland				
Switzerland	NA	2.24	NA	NA
Turkey				
Turkey	1.15	1.24	1.18	1.19
United Kingdom				
United Kingdom	1.84	1.85	NA	NA
Yugoslavia				
Yugoslavia	1.51	1.61	1.20	1.53
Middle East				
Israel	NA	1.63	NA	1.60
Saudi Arabia	.08	.15	.08	.15
Africa				
Ethiopia	1.44	1.44	1.20	1.20
Ghana	.67	.44	.56	.37
Kenya	NA	1.55	NA	1.11
Morocco	1.47	1.49	1.33	1.32
South Africa, Rep. of	2.60	NA	1.58	NA
Tunisia	NA	NA	.50	.61
Asia-Pacific				
Australia	1.54	1.37	1.54	1.38
Burma	NA	.27	NA	.27
Indonesia	.84	.78	.63	.54
Japan	1.72	1.58	1.27	1.34
Korea, South	NA	1.27	NA	1.44
Pakistan	1.13	1.16	.78	.79
Philippines	1.20	.95	1.20	.95
Singapore	1.02	1.07	1.15	1.17
Sri Lanka	1.26	1.26	1.02	1.02
Thailand	1.00	1.15	1.01	1.01

Source: International Energy Annual 1983 (see foot notes on preceding page).

WE'VE GOT GUTS...

A layer of Polyurethane foam insulation between the outer and inner walls keeps beverages hotter or colder longer than most mugs and tumblers. Your logo represents your store. Why put your logo on anything but a premier mug or tumbler? 8 oz. mug or 12 oz. tumbler for hot or cold. 12 oz. tumbler also holds beverage cans. Available with or without lids. A new non-skid holder-base is available.



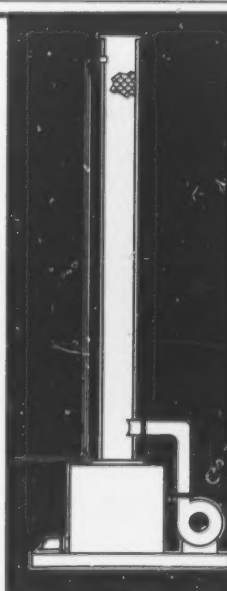
Aladdin
C-Store Division

703 Main Street
Needham, MA 02462

Remove Organic Contamination from Water with AirPurge Systems

AirPurge Air Stripping Systems are an efficient and economical method for removing volatile organic compounds (VOCs) from contaminated water. Our standardized modular designs result in lower operating costs, ease of installation, and reduced initial purchase cost.

AirPurge Systems operate continuously and are fully automatic. They remove VOCs such as benzene, toluene, trichloroethylene, and ethylbenzene from parts per million concentrations down to as low as one part per billion and in some cases below detectable levels.



nepcco

29 Wall Street, Foxboro, MA 02035
617/543-8458



6 Reasons to Install Red Jacket Petroleum Pumping Systems

1. **Selection.** Red Jacket is the only manufacturer offering a selection of 1/3, 1/4 and 1 1/2 HP in 4-inch diameter pumps and 1, 1 1/2, 2, 3 and 5 HP in 6-inch diameters.
2. **Integrated design.** Only Red Jacket manufactures both the motor and pump assembly in the 4-inch series. And Red Jacket still offers the best pump-motor replacement program in the industry.
3. **Exclusive manifold design.** The Red Jacket leak detector screws directly into the manifold. This eliminates the need for an adapter and pipe nipple, reduces installation time and permits the use of a smaller manhole—resulting in a lower total system cost.
4. **Ease of servicing.** One small assembly contains all the functional elements of the pump and can be removed easily, as a unit.
5. **Fast delivery.** Order processing on common 4-inch pump sizes averages between 3 and 5 working days.
6. **Sizing assistance.** Red Jacket's application engineers are highly qualified to assist in sizing and pump selection on any submersible installation.

Red Jacket Has the Experience to Meet Your Needs

For 29 years we've been providing quality products to the petroleum industry. This experience is in every product—in design, testing and workmanship. It's there because you deserve nothing less.

	THE MARLEY PUMP COMPANY A Marley Company
	RED JACKET PUMPS

5800 Foxridge Dr., Mission, KS (913)722-1485
International Sales — Mission, KS Telex 718879045 MARLY UW
In Canada — 126 East Dr., Brampton, Ontario L6T 1C2 (416)791-3330

RJ-P-186

HERE'S TO YOU, AMERICA.



"Somebody
still cares about quality."TM

ANHEUSER-BUSCH, INC.
ST. LOUIS, MO

Service Station Shakeout Slows Down

Has the precipitous decline in the service station population finally reached the bottoming out stage? It would appear that way, based on government and industry calculations and projections for 1984 and 1985 which include significant revisions of the forecasts that were made only a year ago.

The good news is contained in the 1983-1985 franchising report of the Bureau of Industrial Economics of the Department of Commerce.

The study says the 1984 population decline wasn't nearly as great as had been forecasted. It also says that the 1985 population decline will be the lowest one-year decrease since the big slide began way back in the hectic, oil-short days of 1973.

The 1984 population is estimated at 132,080 service stations. The 1985 projection is 130,000.

To put these figures in perspective, it should be noted that the early 1984 population forecast was 130,000 and that at least 6,500 retail outlets would vanish during the 12-month period.

Instead, the revised estimate for the 1984 population is 132,080 stations—meaning that only 4,500 stations had disappeared, 2,000 fewer than expected.

It also moved back by one full year the projection that the service station population would fall to around 130,000—that won't happen until year-end 1985.

The franchising study itself makes no projections on the possible bottoming out of the population slump. It sticks to its statistical knitting with drab tables and factual recitations. But industry observers were quick to note that the slowdown in the population decline may signal the end.

There's a building and rebuilding program going on now as majors and independents alike fight for diminishing market shares. Although some analysts had said in the past, while everything was going downhill at a breathtaking pace, that the service station population could possibly drop as low as 100,000, most observers felt that 125,000 to 130,000 was a more likely figure. And, that's where it appears to be heading in 1985.

About 2,100 stations are expected to be closed down in 1985. That's the lowest one-year total since 1976, when 2,640 were boarded up.

What this all means, however, is that the service station world has shrunk from 226,459 stations in 1972 to 132,080 in 1984, a drop of 94,379 or 41.7%. If the 1985 figure of 130,000 proves to be correct, the new total would be a drop of 96,459 stations and 42.6%.

That there are fewer stations does not mean the marketing industry is unable to handle the increased volume of passenger cars and other vehicular traffic. Many of

the stations are being replaced by 100,000 to 200,000 gal./month pumpers and more than a few 300,000 gal./month stations.

Thus the years-long shakeout, while causing many casualties among independents, particularly "mom and pop" locations of 30,000 gal./month or so, is having a positive effect on the survivors.

This is borne out by the fact that gross income for the 130,000 service stations is expected to rise to \$111-billion in 1985, up 4% over 1984's \$107-billion.

The Bureau of Industrial Economics'

figures, like those of the U.S. Census Bureau, only involve those service stations that generate 50% or more of their income from the sale of gasoline and oil products. So, it does not take retail pumps at convenience stores and other locations into consideration.

The Census Bureau definitions are so limited that they prompted the American Petroleum Institute to petition the government in November to broaden its base so that the marketing industry could get a better handle on its statistical profile.

Comparable U.S. Census Bureau Data (a)

	1982	1977	1972	% Chng. '82 v. '77	% Chng. '82 v. '72
No. of stations (b)	116,154	147,618	183,365	-21.3%	-19.5%
Total sales (\$100,000)	\$ 94,832	\$ 53,749	\$ 31,440	78.4	71.0
Average per station	\$816,433	\$364,108	\$171,461	124.2	112.4
No. of employees	804,286	672,673	747,068	-10.2	-10.0

(a) Censuses are made every five years. Normally, the count includes stations with payrolls and those without payrolls, i.e., the "mom and pop" and small family operations. In 1982, the Census Bureau overlooked the stations without payrolls, however, so the comparisons in this table are for stations with payrolls, which represented about 81% of the population in 1972 and 83% of the population in 1977.

(b) Stations are those which, by Census Bureau definition, generate 50% or more of their sales dollars from gasoline. Source: U.S. Department of Commerce, Census of Retail Trade for 1982, 1977 and 1972. See related pages in this issue for 1982 breakdowns and the 1980 NPN Factbook for 1977 details.

The Rise and Fall of U.S. Service Stations

Year	No. of Stations (a)			Sales (\$100,000)		
	Total	Company-owned	Franchisee-owned	Total	Company-owned	Franchisee-owned
1985	130,000	23,400	106,600	\$111,322	\$20,038	\$91,284
1984	132,020	23,774	108,306	107,040	19,267	87,773
1983	136,570	24,583	111,987	103,121	18,561	84,560
1982	144,680	26,044	118,646	106,544	19,178	87,366
1981	151,250	27,225	124,025	105,145	18,926	86,219
1980	158,540	30,122	128,418	96,338	18,304	78,034
1979	164,780	31,310	133,480	71,894	13,660	58,234
1978	172,300	32,737	139,563	60,884	12,177	48,707
1977	176,465	33,375	141,160	58,231	11,646	46,585
1976	186,849	37,368	149,472	53,416	10,683	42,733
1975	189,480	37,896	151,584	47,367	9,477	37,910
1974	196,130	39,226	156,904	43,829	8,766	35,063
1973	215,880	47,176	172,704	37,666	7,533	30,183
1972	226,459	44,200	176,259	33,656	6,812	26,844
1971	220,000	44,000	176,000	31,149	6,230	24,919
1970	222,000	44,400	177,600	29,340	5,868	23,472

(a) As defined by U.S. Census Bureau, stations with 50% or more of their income from sales petroleum products. Source: "Franchising in the Economy, 1983-1985," U.S. Department of Commerce, January 1985.

The Outlook: 1985's Loss Only 1.6%

	1985	1984	1983	Percent Change	
				1985-84	1984-83
Number of establishments ..	130,000	132,080	136,570	(1.6)	(3.3)
Company-owned	23,400	23,774	24,583	(1.6)	(3.3)
Franchisee-owned	106,600	108,306	111,987	(1.6)	(3.3)
Total sales of products and services (Add 000,000) ..	\$111,322	\$107,040	\$103,121	3.8	4.0
Company-owned	20,038	19,267	18,561	3.8	4.0
Franchisee-owned	91,284	87,773	84,560	3.8	4.0
Average per station	\$856,322	\$810,418	\$755,079	5.7	7.3
No. of employees	NA	NA	530,700	—	—

(a) As of Dec. 31 of each year; (b) Service stations as defined by U.S. Census Bureau, i.e., stations with 50% or more of their income being derived from the sale of petroleum products. Source: "Franchising in the Economy, 1983-85," U.S. Department of Commerce, January 1985.

Census Bureau Data: Service Stations with Payrolls

When it made its 1982 census of the retail trade, like it does every five years, the Census Bureau made one small mistake: incomplete data made it possible for the bureau to come up only with population totals on service stations with payrolls. Thus, the traditional "universe," which would include all of the "mom and pops" and one-man businesses, will not be available again until 1987. The data on this page is confined to stations with

payrolls—which represent about 85% of the industry. The data, however, cannot be compared to the more complete census reports in earlier *NPN Factbook* editions. It must be borne in mind, too, that the Census Bureau counts only those stations which generate 50% or more of their sales dollars from gasoline and petroleum products. Not included in the totals are the outlets at convenience stores, mass merchandisers, garages and fleet stations, etc.

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 (\$1,000)	% change 1977 to 1982	1982 (\$1,000)	% change 1977 to 1982	
United States	116,154	147,618	\$94,632,489	75.9	\$4,789,073	24.4	604,286
Alabama	2,001	2,631	1,172,677	62.2	54,946	11.6	7,628
Alaska	176	157	205,901	109.6	15,680	45.4	1,220
Arizona	1,204	1,535	1,306,398	102.1	62,277	39.2	7,544
Arkansas	1,218	1,631	766,587	79.3	40,955	25.4	5,339
California	10,624	13,215	10,521,934	86.9	517,631	36.5	64,733
Colorado	1,570	2,119	1,429,634	110.1	70,850	31.9	9,404
Connecticut	1,726	2,017	1,446,166	82.6	84,330	39.6	9,957
Delaware	300	394	265,531	69.0	11,783	17.9	1,571
District of Columbia	158	242	180,038	30.9	10,124	-15.5	1,137
Florida	5,504	6,363	4,778,928	107.4	243,650	54.4	29,419
Georgia	3,077	4,011	2,382,709	89.4	115,815	25.7	14,838
Hawaii	367	382	406,064	134.6	28,630	55.9	3,706
Idaho	494	661	352,934	69.4	16,753	25.3	2,408
Illinois	5,132	6,781	4,590,544	56.1	234,275	9.8	28,256
Indiana	3,167	4,143	2,726,474	66.7	129,531	10.4	16,302
Iowa	2,064	2,781	1,374,662	54.0	72,267	7.2	9,512
Kansas	1,511	2,033	1,067,526	70.1	57,614	21.5	7,118
Kentucky	2,119	2,753	1,553,143	61.7	74,706	11.6	9,688
Louisiana	1,972	2,417	1,534,832	69.2	77,925	37.5	10,479
Maine	640	767	385,236	65.3	20,894	29.2	2,909
Maryland	1,877	2,249	1,999,672	98.1	111,816	22.3	13,801
Massachusetts	2,962	3,468	2,318,222	85.2	116,424	27.3	16,662
Michigan	4,130	5,684	3,992,341	59.1	172,141	6.7	22,045
Minnesota	2,229	2,801	2,044,267	78.4	103,413	25.6	13,296
Mississippi	1,191	1,557	686,888	64.7	36,281	31.8	4,902
Missouri	2,944	4,041	2,228,484	57.6	117,632	10.9	14,606
Montana	528	752	399,439	80.4	22,171	17.6	2,923
Nebraska	1,129	1,426	743,218	49.0	39,232	1.8	5,206
Nevada	476	582	564,273	94.3	31,843	51.5	3,592
New Hampshire	547	637	399,472	70.3	20,215	25.8	2,692
New Jersey	4,157	4,597	3,154,818	83.5	182,251	32.2	20,117
New Mexico	780	1,067	645,949	86.4	32,993	26.7	4,248
New York	6,328	7,973	4,404,389	53.7	236,696	12.5	28,003
North Carolina	3,048	4,085	1,896,100	58.4	91,469	15.1	11,545
North Dakota	422	540	362,675	91.3	21,529	58.4	2,650
Ohio	5,904	7,800	5,303,649	75.5	236,688	8.3	30,714
Oklahoma	1,599	2,306	1,138,925	93.5	61,394	44.1	7,963
Oregon	1,492	1,852	1,107,522	78.0	58,710	30.9	7,598
Pennsylvania	5,781	7,253	4,275,721	58.3	208,024	14.5	29,618
Rhode Island	515	610	370,096	77.1	17,648	31.9	2,352
South Carolina	1,666	2,267	1,196,102	81.5	56,875	26.8	7,636
South Dakota	533	666	356,755	58.9	17,190	7.4	2,343
Tennessee	2,490	3,305	1,957,688	81.7	92,960	23.5	11,807
Texas	8,213	10,394	6,574,282	101.3	342,896	48.8	41,777
Utah	842	993	657,296	86.6	31,218	33.6	4,362
Vermont	359	455	217,379	64.1	12,339	35.5	1,731
Virginia	2,652	3,371	2,460,271	72.1	127,107	21.4	15,510
Washington	2,146	2,689	1,697,039	84.5	86,391	36.2	10,569
West Virginia	1,061	1,343	709,115	57.1	35,544	19.8	4,617
Wisconsin	2,701	3,304	2,109,613	77.3	103,871	27.1	13,929
Wyoming	430	538	396,618	95.4	22,842	49.0	2,475

Source: U.S. Census Bureau, 1982 Census of Retail Trade, Preliminary Report, issued in October 1984.

Service Station Population by States— 1985 vs. 1982 (a)

The service station population totals on this page are projections by NPN based on more limited data than had been used in previous *Factbooks*. Because the U.S. Census Bureau was unable to provide a "universe picture" in 1982, as it had in 1977 and 1972, the 1982 totals are of stations with payrolls only—about

85% of the industry. Thus, these station totals cannot be compared with those published in prior *Factbook* editions, which included all the "moms and pops" and smaller stations which had no formal payroll operations.

	Total Gasoline Service Stations				Total Sales (add 000)			
	1985(a)	1984(a)	1983(a)	1982(b)	1985(a)	1984(a)	1983(a)	1982(b)
Alabama.....	1,797	1,827	1,889	2,001	1,253,269	1,207,388	1,160,950	1,172,677
Alaska.....	158	161	166	176	220,052	211,996	203,842	205,901
Arizona.....	1,081	1,099	1,137	1,204	1,396,180	1,345,067	1,293,334	1,306,396
Arkansas.....	1,092	1,110	1,148	1,216	819,271	789,278	758,921	766,587
California.....	9,543	9,698	10,029	10,624	11,245,052	10,833,383	10,416,715	10,521,934
Colorado.....	1,410	1,433	1,482	1,570	1,527,885	1,471,951	1,415,338	1,429,634
Connecticut.....	1,550	1,576	1,629	1,726	1,545,553	1,488,973	1,431,704	1,446,166
Delaware.....	289	274	300	300	283,780	273,391	262,876	265,531
D.C.....	142	144	149	158	192,411	185,367	178,238	180,038
Florida.....	4,944	5,024	5,196	5,504	5,107,359	4,920,384	4,731,139	4,778,928
Georgia.....	2,764	2,809	2,905	3,077	2,546,460	2,453,237	2,358,882	2,382,709
Hawaii.....	330	335	346	367	433,971	418,083	402,003	406,064
Idaho.....	444	451	468	494	377,189	363,381	349,405	352,934
Illinois.....	4,610	4,685	4,845	5,132	4,906,028	4,726,424	4,544,639	4,590,544
Indiana.....	2,845	2,891	2,990	3,167	2,913,850	2,807,178	2,699,209	2,726,474
Iowa.....	1,854	1,864	1,949	2,064	1,489,135	1,415,352	1,360,915	1,374,662
Kansas.....	1,357	1,379	1,428	1,511	1,140,894	1,099,127	1,056,853	1,067,520
Kentucky.....	1,903	1,934	2,000	2,119	1,659,882	1,599,116	1,537,612	1,553,143
Louisiana.....	1,771	1,800	1,862	1,972	1,640,313	1,580,263	1,519,484	1,534,832
Maine.....	575	584	604	640	411,713	396,641	381,386	385,238
Maryland.....	1,886	1,713	1,772	1,877	2,137,099	2,058,862	1,979,675	1,999,672
Massachusetts.....	2,681	2,704	2,796	2,962	2,477,541	2,386,841	2,295,040	2,318,222
Michigan.....	3,710	3,770	3,899	4,130	4,266,714	4,110,514	3,952,418	3,992,341
Minnesota.....	2,001	2,034	2,103	2,228	2,184,759	2,104,777	2,023,824	2,044,267
Mississippi.....	1,070	1,087	1,124	1,191	734,094	707,220	680,019	686,888
Missouri.....	2,644	2,687	2,779	2,944	2,381,636	2,294,447	2,206,199	2,228,484
Montana.....	474	482	498	528	426,890	411,262	395,445	399,439
Nebraska.....	1,014	1,031	1,086	1,129	794,296	765,217	735,786	743,218
Nevada.....	428	435	449	476	603,053	580,975	558,630	564,273
New Hampshire.....	491	498	516	547	426,926	411,296	395,477	399,472
New Jersey.....	3,734	3,795	3,924	4,157	3,371,632	3,248,201	3,123,270	3,154,818
New Mexico.....	701	712	738	780	690,342	665,069	639,490	645,949
New York.....	5,884	5,777	5,874	6,328	4,707,080	4,534,759	4,360,345	4,404,389
North Carolina.....	2,739	2,783	2,879	3,049	2,026,409	1,952,225	1,877,139	1,896,100
North Dakota.....	379	385	398	422	387,600	373,410	359,048	362,675
Ohio.....	5,303	5,389	5,573	5,904	5,668,141	5,460,637	5,250,613	5,303,649
Oklahoma.....	1,436	1,460	1,509	1,599	1,217,197	1,172,637	1,127,536	1,138,925
Oregon.....	1,340	1,362	1,408	1,492	1,183,636	1,140,305	1,096,447	1,107,522
Pennsylvania.....	5,193	5,277	5,457	5,781	4,569,569	4,402,282	4,232,964	4,275,721
Rhode Island.....	463	470	486	515	395,531	381,051	366,395	370,096
South Carolina.....	1,496	1,521	1,573	1,666	1,280,441	1,233,566	1,186,121	1,198,102
South Dakota.....	479	487	503	533	381,273	367,315	353,187	356,755
Tennessee.....	2,237	2,273	2,351	2,490	2,092,230	2,015,636	1,936,111	1,957,688
Texas.....	7,377	7,497	7,753	8,213	7,026,098	6,768,881	6,508,539	6,574,282
Utah.....	756	769	795	842	702,469	676,752	650,723	657,296
Vermont.....	322	328	339	359	232,318	223,813	215,205	217,379
Virginia.....	2,382	2,421	2,503	2,652	2,629,353	2,533,095	2,435,688	2,460,271
Washington.....	1,928	1,969	2,028	2,146	1,813,668	1,747,271	1,680,069	1,697,039
West Virginia.....	953	969	1,002	1,061	757,849	730,105	702,024	709,115
Wisconsin.....	2,426	2,466	2,590	2,701	2,254,596	2,172,058	2,088,517	2,109,613
Wyoming.....	386	393	406	430	426,013	410,417	394,632	398,618
Total.....	104,334	106,031	108,648	116,154	101,336,699	97,626,878	93,871,998	94,820,200

(a) Projected by NPN on the basis of Census Bureau and other Commerce Department data. However, as noted above, this data is for stations with payrolls—not the "universe" which the *Factbook* published in prior years. These stations, by Census Bureau definition, are those which generate more than half of their sales dollars through the sale of gasoline and oil products.

(b) U.S. Census Bureau, Retail Trade Census, 1982, published in November 1984.

Source: See footnotes.

Service Station Deactivation Continues

In a significant revision of its 1983 data, the American Petroleum Institute says the deactivation of service stations in that 12-month period was much higher than originally thought.

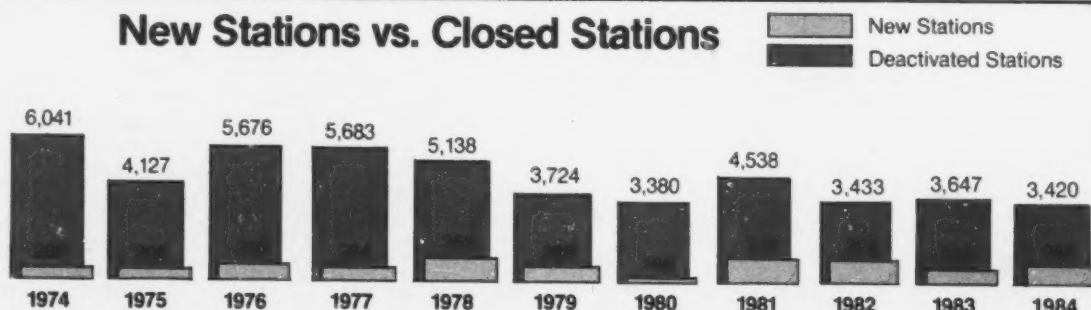
API said the actual number of deactivated stations for 1983 was 3,647. It had originally reported the figure as 3,008, which would have been the lowest number of deactivations in a decade.

API said the number of deactivations in 1984 was 3,420, a drop

of 227 stations from the corrected total for 1983.

API added two new categories to its 1985 service station report—modernization and rebuilding. It said 1,289 stations were modernized in the last two years—511 in 1983 and 778 in 1984. It also said 805 stations were rebuilt in that time—290 in 1983 and 515 in 1984. Modernization was described generally as face-lifting, while rebuilding was a ground-up make-over.

New Stations vs. Closed Stations



API definitions: A service station is defined as a retail outlet at which 50% of the dollar volume is from gasoline and related products; a newly constructed outlet is defined as one that has been erected completely on vacant land or is new on the site. This category does not include rebuilds. Permanently deactivated outlets are those where equipment and identification have been removed, and where re-opening as a service station is no longer contemplated.

Source: American Petroleum Institute, New Construction Report, May 1984.



Q REELCRAFT

SPRING DRIVEN
**hose
reels**

FOR

- GREASE
- OIL
- ANTI-FREEZE
- AIR
- WATER

**THE VALUE
LEADER...**

HEAVY DUTY FEATURES:

- Dual Main Support Bearings
- 40,000 PSI Tensile Strength Magnesium Aluminum Brackets
- 1 1/2" Hardened Steel Main Shaft
- Positive Latch Hose Control
- Unrestricted Product Delivery

**WORLD-WIDE FIELD
SALES AND SERVICE**

**Q REELCRAFT
INDUSTRIES, INC.**

BOX 248 • COLUMBIA CITY, IN 46725 • 219/248-8188

**LUBE
TRUCKS**

**FLEET
SERVICE**

**LUBE
CARTS**

**AUTO
SERVICE**

FOR SALE LIQUID TERMINALS AND BULK PLANTS

Contact:

Larry McDonough (609) 866-3512

or

Ken Eshelman (609) 866-3478

CORPORATE REAL ESTATE DEPT.

303 Fellowship Road
Moorestown, NJ 08057-1045

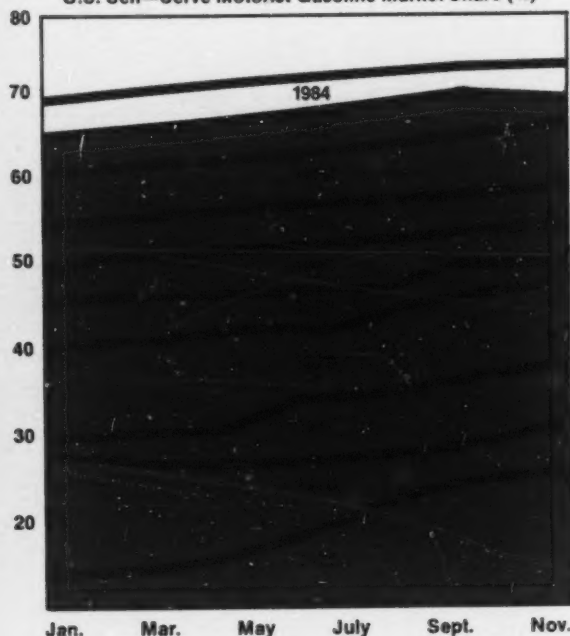


Self-Serve Hits 71%

In 1984, just as in every one of the last 10 years, self-service gained in popularity. It continues to be far and away the most popular way to market gasoline in the U.S.

An Amoco Oil Co. internal report [below] says self-service was preferred by 71% of motorists nationwide in 1984. Indeed, self-service popularity has never flagged since it passed the 50% mark in 1980. The Amoco figures come from a regular poll of its motorist/customers.

U.S. Self-Serve Motorist Gasoline Market Share (%)



State (a)	'84	'83	State (a)	'84	'83
Utah.....	88%	91%	Missouri.....	74%	73%
Arizona.....	87	86	Minnesota.....	73	71
Colorado.....	86	85	Ohio.....	73	70
South Carolina...	86	83	Iowa.....	72	73
Texas.....	84	83	Arkansas.....	71	73
Washington.....	83	82	Mississippi.....	71	70
Wisconsin.....	83	81	Alabama.....	70	70
California.....	82	81	Washington, DC..	70	73
Florida.....	82	80	South Dakota.....	70	65
New Mexico.....	82	86	Wyoming.....	70	69
Montana.....	81	77	Kansas.....	69	65
Nevada.....	81	81	North Dakota.....	69	62
North Carolina...	81	80	Kentucky.....	68	65
Delaware.....	80	70	West Virginia....	64	62
Illinois.....	80	77	Nebraska.....	61	65
Louisiana.....	80	76	Connecticut.....	60	57
Oklahoma.....	80	78	Rhode Island.....	55	48
Virginia.....	80	78	Pennsylvania.....	53	52
Idaho.....	79	79	New Hampshire...	50	48
Georgia.....	78	79	New York.....	48	47
Indiana.....	78	76	Vermont.....	44	38
Maryland.....	76	73	Massachusetts...	36	36
Tennessee.....	76	74	Maine.....	33	27
Michigan.....	75	74			

U.S. Average 1984—71%, 1983—70%

A Conversation Accent For
Office, Shop or Family Room Wall

OLD-TIME GASOLINE PUMP SIGNS



Buy Separately Or Save On Set

Use indoors or out. Authentic reproductions in color and design of signs used on pumps and walls of the "remember-when days" gasoline stations. Each 11½-in. diam. sign is made of 18-gauge steel. Designs are imprinted with steel screen process, then finished in fired-on porcelain enamel. Choose an individual sign, two or more in any design combination or save more, buy the set!

20001 Pump Sign Each \$14.95
20002 Pump Sign Set. (1 of each.) Set 99.95

Mail Coupon Now! Guaranteed Satisfaction

Executive Gift Guild Box 894, Mount Prospect, IL 60056

Please ship Pump Signs (20001) I've indicated below at \$14.95 each, plus shipping and handling (shown at right).

State _____ Quantity A _____ B _____ C _____ D _____ E _____ F _____ G _____ H _____

Please ship _____ Pump Sign Sets (20002) at \$99.95, plus \$5 shipping for each set.

☐ Check or Money Order Enclosed for \$ _____
☐ Charge \$ _____ to my ☐ VISA ☐ MasterCard Account.

Card No. _____ Exp. Date _____

Signature _____

Name _____

Address _____

City _____

State _____ Zip _____

FB685

Shipping Charges

1. \$2.65

2. 3.15

3. 3.85

4. 4.50

5. 5.00

IL residents add 7% Sales Tax

Gasoline Shares by Key Categories—1984

This is a new study made public for the first time by MPSI Americas, Tulsa, Okla., which specializes in international computer software and information services as well as marketing research and planning.

It graphically portrays, on both a national and regional basis, market shares by orthodox service stations, by the big pumpers that focus their efforts on gasoline sales, by the convenience stores that also sell gasoline, and by the grab-bag category of "others," which includes car washes, garages and similar facilities.

This study involves primarily the metropolitan areas of the

country, where most of the gasoline is marketed. It makes no attempt to count the rural vendors and the highway units which, while important to the industry, do not add materially to the overall consumption statistics.

Of significance is the fact that the service stations in these metropolitan areas average a little more than 60,000 gal. monthly. This is substantially higher than the U.S. average for all service stations, which still runs around 40,000 gal. month. It also is interesting to note that pumpers in the selected metropolitan areas averaged 110,252 gal./month during 1984.

Regional and National Market Shares

	Service Stations	Pumpers	Convenience Food Stores	Others	Total
Northeastern Region					
• % of Outlets	62.4	24.2	2.6	10.8	100.0
• % of Volume	59.1	37.0	1.2	2.7	100.0
• Avg. Monthly Volume (Gallons)	73,931	119,412	35,159	19,798	78,126
Midwestern Region					
• % of Outlets	44.1	35.3	4.9	15.7	100.0
• % of Volume	35.6	55.9	3.1	5.4	100.0
• Avg. Monthly Volume (Gallons)	52,533	102,822	41,226	22,261	65,005
Sunbelt Region					
• % of Outlets	33.1	27.9	23.8	15.2	100.0
• % of Volume	31.4	51.7	11.7	5.2	100.0
• Avg. Monthly Volume (Gallons)	56,806	110,950	29,330	20,911	59,932
Western Region					
• % of Outlets	55.8	27.4	6.0	10.8	100.0
• % of Volume	47.5	46.2	2.6	3.7	100.0
• Avg. Monthly Volume (Gallons)	55,181	109,193	28,451	21,779	64,815
Total United States					
• % of Outlets	47.6	28.4	10.9	13.1	100.0
• % of Volume	43.6	47.2	5.0	4.2	100.0
• Avg. Monthly Volume (Gallons)	60,780	110,257	30,572	21,182	66,311

Source: MPSI Americas, Inc., Tulsa, Okla.



The fastest zero to sixty in its class.

It's a fact. Coca-Cola has the fastest shelf turnover in the soft drink category — 60 times a year! Compare that to the industry average of 46 times a year, or 5 times a year for the average H & BA item, and you get a faster return on investment. Along with higher volume and a great bottom line.

That's fast turnover you can count on consistently, too. Because Coca-Cola is the best-selling soft drink in the world. In fact, your customers reach for real refreshment from The Coca-Cola Company over 265 million times a day! Talk about traffic!

So, if your race to profits could use some high-speed performance, go with Number One. After all, we've got what it takes to make you a winner every time.

Coke is it!
For sales and profits.

For more information, contact your local
Coca-Cola Bottler. Or call V. Ray Moore,
Vice President National Sales at
(404) 676-2132.



Business at Service Stations

Dollar Volume and Product Sales

Year	No. of service stations	Total sales (add 000,000,000)	Avg. per station (add 000)	Passenger cars (add 000)	Gasoline		Motor oil	
					Avg. gal.	Sales (000,000 gal.)	Qts. per year	Sales (add 000,000 qt.)
1985.....	130,090(a)	\$111.3	\$856.3	—	—	—	—	—
1984.....	132,080(a)	107.0	810.4	132,080	570	75,286	—	—
1983.....	136,570(a)	103.1	755.1	126,727	577	72,922	—	—
1982.....	144,690(a)	106.2	733.0	123,746	587	72,638	7.3	907
1981.....	151,250(a)	101.7	672.4	123,462	579	71,484	7.3	909
1980.....	158,540(a)	96.3	608.0	121,723	603	73,399	7.3	907
1979.....	164,790(a)	70.9	430.0	120,248	664	79,845	7.3	880
1978.....	172,300(a)	60.9	353.0	116,534	715	83,760	7.6	921
1977.....	176,465(b)	56.5	320.0	113,696	706	80,269	7.9	900
1976.....	186,400(a)	48.0	257.0	110,188	711	78,344	8.0	887
1975.....	189,480(a)	43.8	232.0	106,712	712	75,979	9.5	1,014
1972.....	226,459(a)	33.7	148.8	96,567	755	72,908	10.0	966

(a) Franchising in the Economy 1983-85, Department of Commerce; Bureau of Census definition of service stations: 50% or more of dollar volume comes from the sale of petroleum products.

Station Customers

Year	No. of service stations	Privately owned passenger cars		Households owning cars		Licensed drivers		Women drivers	
		Total (add 000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station
1984.....	132,080(a)	136,053	984.7	74.0	560.2	157.3	1,190.8	74.9	567.1
1983.....	136,570(a)	126,727	927.9	73.0	534.5	154.2	1,129.1	73.4	537.5
1982.....	144,690(a)	123,746	855.8	72.0	497.6	150.3	1,038.8	71.7	491.9
1981.....	151,250(a)	123,462	816.3	70.0	460.5	147.0	969.0	69.2	457.5
1980.....	158,540(a)	121,723	767.8	67.2	423.8	145.3	916.7	68.1	429.5
1979.....	164,790(a)	120,248	731.1	65.9	400.0	143.3	868.3	66.8	403.5
1978.....	172,300(a)	116,534	676.3	64.6	375.0	140.8	817.1	65.3	379.0
1977.....	176,465(a)	113,696	644.3	63.3	365.5	138.4	784.4	63.7	361.0
1976.....	186,400(a)	110,188	591.1	62.0	332.6	130.3	689.4	57.9	306.3
1975.....	189,480(a)	106,712	563.2	60.5	319.3	127.8	662.2	56.8	294.3
1972.....	226,459(b)	96,567	426.4	52.8	232.2	118.4	522.8	52.6	232.3

(a) Franchising in the Economy 1983-85, Department of Commerce.

(b) Bureau of Census definition of service stations: 30% or more of dollar volume comes from the sale of petroleum products.

Source: Based on data from Motor Vehicle Mfgs. Assn., Federal Highway Administration, and NPN.

How Stations Rank in Sales

(Billions of Dollars)

	1984	% Change '84-'83	1983	% Change '83-'82	1982	% Change '82-'81	1981	% Change '81-'80
All Retail Stores.....	1,295.8	10.4%	1,174.0	9.2%	1,074.6	3.4%	1,038.8	9.1%
Food Group.....	275.3	6.1	259.4	4.1	249.3	4.9	237.6	9.6
Automotive Group.....	264.2	19.2	221.7	21.4	182.6	1.1	180.7	11.3
General Merchandise.....	157.4	10.8	142.0	7.1	132.6	4.0	127.5	9.1
Eating and Drinking Places.....	125.5	8.5	115.7	10.5	104.7	11.3	94.1	9.7
Gasoline Service Stations.....	105.0	1.8	103.1	(0.4)	103.5	1.8	101.7	8.7
Apparel Group.....	59.4	10.0	54.0	5.1	51.4	7.5	47.8	7.7

Source: Survey of Current Business, Department of Commerce, Vol. 65, No. 1, January 1985.

Personal Consumption Expenditures

	(Billions of Dollars)				Seasonally Adjusted at Annual Rate—1984				
	1984	% Change '84-'83	1983	% Change '83-'82	1982	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
Total Expenditures.....	\$2,342.3	8.6%	\$2,155.9	8.2%	\$1,991.9	\$2,276.5	\$2,332.7	\$2,361.4	\$2,398.6
Durable Goods.....	318.4	13.8	279.8	14.4	244.5	310.9	320.7	317.2	324.7
Automobiles.....	149.5	15.6	129.3	17.7	109.9	147.7	152.3	148.6	149.4
Furniture.....	117.1	12.5	104.1	11.4	93.5	113.0	116.6	116.8	122.0
Other Durable.....	51.8	11.6	46.4	12.9	41.1	50.3	51.7	51.9	53.3
Nondurable Goods.....	858.3	7.1	801.7	5.3	761.0	841.3	858.3	861.4	872.1
Food.....	444.3	6.7	416.5	12.6	369.9	433.9	442.1	448.6	452.6
Clothing and Dress.....	140.3	10.5	127.0	6.7	119.0	136.1	142.2	139.3	143.7
Gasoline and Oil.....	91.7	1.9	90.0	(1.6)	91.5	92.0	92.8	90.0	92.0
Other Nondurable Goods.....	182.0	8.2	168.2	9.6	153.5	179.3	181.2	183.6	183.8
Fuel Oil and Coal.....	21.3	1.4	21.0	5.0	20.0	22.5	21.6	21.1	19.8
Other Nondurable.....	160.7	9.2	147.2	10.3	133.5	156.7	159.7	162.5	163.9
Services.....	1,165.7	8.5	1,074.4	8.9	986.4	1,124.4	1,153.7	1,182.8	1,201.8

Source: Survey of Current Business, Department of Commerce, Vol. 65, No. 1, January 1985.

How 1984 Mergers Changed Retail Rankings

With 1984's oil mergers came significant changes in ranking and station numbers for three of the top 21 companies.

For the other 18, 1984 was marked only by the now-usual number of pullouts, consolidations, and station closings.

Texaco jumped to the top of the heap in '84 with a net gain of 868 outlets, including those from the Getty Oil purchase and new Texaco 2000 units, and added three states to its marketing string. In the fall, however, the company will pull out of branded marketing in Indiana, Kentucky, Wisconsin, and most of Illinois.

Chevron was busy in late 1984 solidifying its merger with Gulf, and actually ended the year with one less state and nearly 1,500 fewer outlets than it had in '83. But now that it officially has added the 7,922 Gulf properties it retained, it will come out a winner, moving from No. 6 to No. 2 with 18,540 stations in 42 states. It remains to be seen if Chevron will leapfrog to No. 1 when Texaco sheds those Midwest outlets.

The biggest winner of all was Sohio. The Southeast properties it picked up in the FTC-mandated Chevron/Gulf merger scramble helped it add the major part of 6,460 units for a total of 8,560 branded retail outlets. When the year ended, Sohio was sitting at No. 9, up from No. 15 on the list.

As a sidelight, unranked Power Test became the nation's largest independent marketer in early January when it took control of the Northeast Getty assets from Texaco. At the end of 1983, the company reported 475 outlets in five states. The company now reports approximately 2,300 gasoline stations in a 12-state area—a total that would put it at No. 15 in the rankings.

	Outlets	'83
1 Texaco	19,558	(2)
2 Exxon	18,139	(1)
3 Amoco	15,652	(3)
4 Mobil	13,862	(4)
5 Shell	11,010	(5)
6 Chevron	10,618	(6)
7 Union	10,365	(8)
8 Phillips	9,705	(7)
9 Sohio	8,560	(15)
10 Sunoco	6,425	(9)
11 Conoco	4,800	(10)
12 Fina	4,385	(12)
13 Arco	3,884	(11)
14 Citgo	3,599	(13)
15 Marathon	2,299	(14)
16 Diamond Shamrock	2,060	(17)
17 Ashland	1,910	(16)
18 Kerr-McGee	1,839	(18)
19 Murphy	591	(19)
20 Tenneco	423	(20)
21 Crown Central	188	(21)

	Number of states*		Branded retail outlets	
	'84	'83	'84	'83
Amoco	36	35	15,652	17,800
Arco	22	24	3,884	4,385
Chevron	38(a)	39	10,618(a)	12,111
Exxon	38	41	18,139	18,707
Mobil	41	43	13,862	15,403
Shell	38	40	11,010	12,147
Texaco	46	43	19,558	18,690
Ashland	15	15	1,910	2,071(b)
Citgo	31	31	3,599	3,915
Conoco	34	40	4,800(d)	5,091
Crown Central	7(c)	8	188(c)	200(d)
Diamond Shamrock	24	25	2,060	1,993
Fina	22	20	4,385	4,037
Kerr-McGee	22	21	1,839	1,785
Marathon	6	5	2,299	2,210
Murphy	14	14	591	614
Phillips	34	37	9,705	11,827
Sohio	30	20	8,560	2,100
Sunoco	29	27	6,425	6,808
Tenneco	15	15	423	418
Union	42	44	10,365	11,221

Source: APN questionnaires.

*Includes District of Columbia.

(a) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

(b) Old 1983 count of 187 outlets was for Ashland-branded company-ops only—new counts include all of Ashland's branded outlets, plus SuperAmerica and other direct-operated brands.

(c) After May 1 station swap with Mobil, total is 185 stations in six states.

(d) Approximately.

C-Store Growth Continues Skyward

Six out of 10 convenience stores now are selling gasoline, and the number is expected to increase as U.S. population expands, according to John Roscoe, a West Coast C-store chain operator himself and the author of the annual "Dollars Per Day Survey of the Small Food Industry."

In his 1985 summary, which is an analysis of the top 11 publicly owned chains extrapolated to represent the industry as a whole, Roscoe said the surveyed group had 13,883 stores in 1983, of which 53.4% sold gasoline. He said this group alone accounted for 2.9-billion gal. of gasoline in 1983, which was 2.9% of what he estimates to be a 99.4-billion-gal. national market.

Going a step further, and looking at both 1984 and 1985, Roscoe said:

"Our best estimate of the amount of gasoline sold through all C-type stores, which includes traditional convenience stores, plus other food and gasoline combinations, for 1983 is 14.2-billion gal. or 14.7% of the highway gasoline sold in the United States.

"We estimate that there are about 53,000 convenience-type stores in the United States and that 63% of them now sell gasoline. On the average, they sell 1,201 gal./day per store. Over 20% of the gasoline sold in the United States will be sold through this type of outlet in 1985. In 1976, only 1% of the total gasoline sold in the United States was sold through convenience stores."

Roscoe's summary noted that he was probably the first to sell gasoline through a remote-controlled, self-service pump in 1964, thus establishing a beachhead for gasoline operations in the food-store industry.

One C-store chain, Southland (7-Eleven), marketed almost 1.4-billion gal. of gasoline in 1983. The chain, even though primarily a grocery store operation, had been regarded as the nation's leading independent gasoline marketer until it purchased Citgo Oil Co.'s facilities in 1983 and also acquired a refinery, which changed its status to a refiner-marketer in the perspective of traditional oil marketing. (Power Test Corp., which in early 1985 acquired Getty Oil's eastern marketing facilities from Texaco, is now considered the nation's leading independent gasoline marketer.)

Southland has 7,300 stores all told—more than triple the number of its nearest competitor, Circle K. But only 41% of Southland's stores sell gasoline while 67% of Circle K's do. Casey's, a chain of 427 stores, sells gasoline at all of them for a 100% performance. Sunshine Jr. sells gasoline at nine out of 10 of its 345 stores. Others conform in varying percentages ranging from 16% to 70%.

The federal government also takes a look at the C-store field, but limits itself to the franchised businesses, thus the totals are much smaller. The growth record parallels Roscoe's findings, however. The government data indicates that the franchised convenience store population will be around 16,000 by the end of this year. This will be a growth of 4.4% in 1985 on top of a growth of 4.4% in 1984 (See Franchise Projections table at right).

More interesting, however, is the government's projection that these franchised stores will handle \$12.3-billion in sales and services in 1985, up 10% over 1984 which, at \$11.2-billion, was likewise up 10.1% over 1983. In other words, not only are the numbers increasing but the sales volumes as well.

Roscoe, in his annual pre-tax dollars-per-day ranking of the most profitable companies, gave the nod to Shop & Go., Mango, Fla., for the fourth consecutive year. The others in descending order were National Convenience Stores, Houston, Texas; Circle K, El Paso, Texas; Lil' Champ, Jacksonville, Fla.; Southland Corp. (7-Eleven), Dallas, Texas; Little General, Tampa, Fla.; Dairy Mart Convenience Stores, Enfield, Conn.; Casey's General Stores, Des Moines, Iowa; Sunshine Jr. Stores, Panama City, Fla.; Munford Inc., Atlanta, Ga.; and Conna Corp., Louisville, Ky.

Dollars Per Day Survey

Company	# of Gasoline Units	Gal. Sold in 1983 (Add 000)	Avg. Gal. Sold per Day per Unit	Gasoline Margin per Gal.	% of Sales Contributed by Gasoline
Shop & Go	307	106,000	982	3.2c	36.9%
Nat'l Convenience	775	310,000	1,152	6.7c	39.7
Southland	3,007	1,361,200	1,279	N/A	25.5
Circle K	1,463	346,000	915	6.8c	37.1
Lil' Champ	101	24,943	745	4.1c	31.1
Little General	212	44,794	586	N/A	22.6
Casey's	427	145,129	1,294	7.8c	53.4
Sunshine Jr.	321	68,647	586	N/A	52.0
Munford	469	373,000	2,185	N/A	N/A
Dairy Mart	28	12,397	1,332	N/A	N/A
CONNA	268	134,000	1,374	N/A	36.8
Totals	7,378	2,926,188	1,201	N/A	N/A

Source: John F. Roscoe, 14th Annual Dollars-Per-Day Survey—1985.

Ten-Year Box Score on Growth

Survey Year	No. of Stores	Net Growth	No. with Gasoline Units	Gasoline Units Added in Year	% of Stores with Gasoline Units
1984 (a)	13,883	1,607	7,378	990	53.14%
1983 (a)	12,276	—	6,029	480	49.11
1982	12,400	107	5,729	393	46.76
1981	12,445	205	5,533	442	44.45
1980	13,167	247	5,630	447	42.76
1979	12,920	313	5,153	569	39.88
1978	12,597	644	4,584	792	36.38
1977	11,953	360	2,792	959	31.72
1976	11,356	672	2,786	557	24.53
1975	10,143	928	2,147	194	21.16

(a) Ten chains in this survey versus 11 chains in previous studies.

Source: 14th annual Dollars-Per-Day Survey, John F. Roscoe, March 1985.

Government Franchise Projections

	1985	1984	1983	Percent Changes	
				'83-'84	'84-'85
Total number of establishments:	15,998	15,331	14,683	4.4%	4.4%
Company-owned	9,109	8,795	8,446	3.6	4.1
Franchisee-owned	6,889	6,536	6,237	5.4	4.8
Total sales of products and services: (\$000)	\$12,308,939	\$11,189,394	\$10,148,118	10.0	10.3
Company-owned	7,819,214	7,080,234	6,388,603	10.4	10.8
Franchisee-owned	4,489,725	4,109,160	3,759,515	9.3	9.3

Distribution by Establishments—1983

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	%	(\$000)	%
1001 and Greater	4	10,301	70.2	\$ 8,178,537	80.6
501 - 1000	9	3,805	25.9	1,711,120	16.9
151 - 500	6	402	2.7	183,916	1.8
51 - 150	9	175	1.2	74,545	0.7
11 - 50					
0 - 10					
Total	28	14,683	100.0	10,148,118	100.0

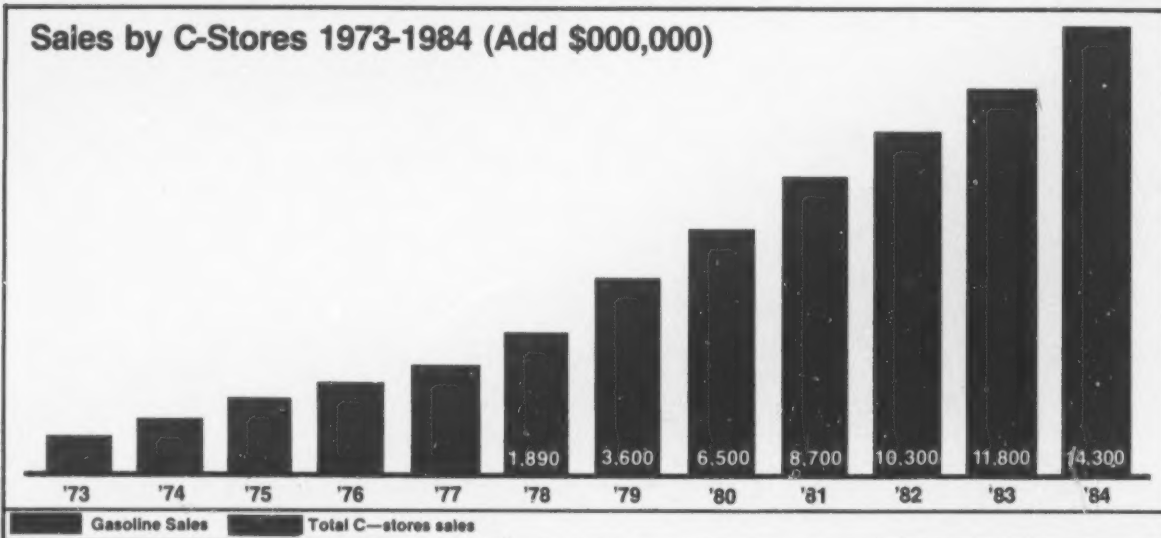
Source: "Franchising in The Economy, 1983-85," U.S. Department of Commerce, January 1985.

Convenience Store Population—1983

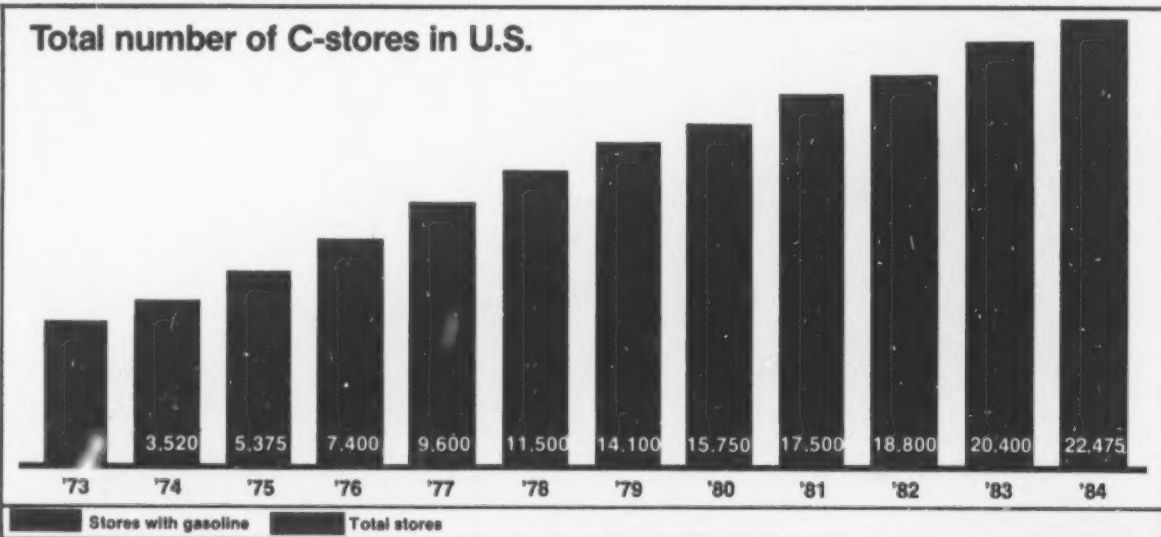
	Population (000)	Households (000)	Super- markets	C-stores	Convenience store sales (000,000)		Households per C-store
					In-store	Gasoline	
New England	12,605	4,658	1,435	1,902	\$756	\$450	2,449
Maine.....	1,157	425	142	155	67	55	2,742
New Hampshire.....	968	356	143	129	56	37	2,759
Vermont.....	528	193	82	49	17	15	3,930
Massachusetts.....	5,820	2,157	568	971	415	157	2,221
Rhode Island.....	962	360	89	156	48	42	2,306
Connecticut.....	3,170	1,167	411	442	153	144	2,640
Middle Atlantic	37,104	13,821	3,864	3,792	1,877	857	3,645
New York.....	17,678	6,671	1,911	1,044	520	355	6,389
New Jersey.....	7,465	2,701	678	1,150	646	60	2,349
Pennsylvania.....	11,961	4,449	1,375	1,598	711	442	2,784
East North Central	42,020	15,451	5,124	5,059	2,095	1,064	3,054
Ohio.....	10,825	4,019	1,362	2,056	885	300	1,955
Indiana.....	5,518	2,026	762	636	212	172	3,185
Illinois.....	11,574	4,287	1,210	857	423	187	5,002
Michigan.....	9,289	3,351	1,061	950	418	259	3,528
Wisconsin.....	4,814	1,768	729	560	157	146	3,157
West North Central	17,447	6,590	2,310	2,786	1,020	837	2,365
Minnesota.....	4,137	1,533	498	749	271	170	2,047
Iowa.....	2,821	1,104	371	578	134	175	1,911
Missouri.....	5,005	1,911	676	636	302	195	3,003
North Dakota.....	669	244	84	83	23	12	2,941
South Dakota.....	694	255	90	99	43	29	2,571
Nebraska.....	1,598	608	220	203	63	87	2,997
Kansas.....	2,423	935	371	438	184	169	2,135
South Atlantic	39,189	14,598	5,310	9,998	3,269	3,613	1,460
Delaware.....	606	221	70	110	45	30	2,006
Maryland.....	4,341	1,572	474	605	330	126	2,599
District of Columbia.....	626	259	42	108	51	20	2,402
Virginia.....	5,591	2,027	736	1,203	544	236	1,685
West Virginia.....	1,984	730	283	325	126	115	2,247
North Carolina.....	6,102	2,218	1,038	1,530	382	534	1,450
South Carolina.....	3,263	1,127	520	900	294	513	1,252
Georgia.....	5,758	2,062	787	1,513	409	993	1,363
Florida.....	10,918	4,382	1,360	3,704	1,088	1,046	1,183
East South Central	14,973	5,386	2,158	3,356	1,149	1,322	1,605
Kentucky.....	3,714	1,340	538	739	348	344	1,813
Tennessee.....	4,692	1,723	667	1,105	406	448	1,560
Alabama.....	3,993	1,439	561	870	216	297	1,655
Mississippi.....	2,574	884	392	642	181	233	1,377
West South Central	25,554	9,314	3,390	7,257	3,185	2,237	1,284
Arkansas.....	2,347	877	342	450	126	140	1,949
Louisiana.....	4,452	1,562	560	900	319	288	1,736
Oklahoma.....	3,222	1,246	474	1,285	411	578	985
Texas.....	15,533	5,629	2,014	4,642	2,329	1,231	1,213
Mountain	12,266	4,499	1,665	2,676	1,231	691	1,681
Montana.....	808	305	132	182	66	43	1,675
Idaho.....	986	355	185	185	85	40	2,150
Wyoming.....	524	193	85	119	39	32	1,621
Colorado.....	3,093	1,187	334	647	291	188	1,835
New Mexico.....	1,371	486	186	364	159	100	1,335
Arizona.....	2,952	1,089	408	749	385	178	1,454
Utah.....	1,610	517	209	256	109	71	2,019
Nevada.....	922	367	126	194	97	38	1,892
Pacific	33,602	12,809	4,294	3,574	1,918	729	3,584
Washington.....	4,378	1,708	702	558	291	136	3,060
Oregon.....	2,710	1,067	460	437	209	61	2,441
California.....	25,072	9,565	2,943	2,430	1,354	507	3,936
Hawaii.....	1,011	322	119	72	30	11	4,479
Alaska.....	431	147	70	77	34	14	1,916
Total	234,760	87,126	29,550	40,400	\$16,500	\$11,800	2,157

Source: C-Store Business, Research & Data Center, October 1984.

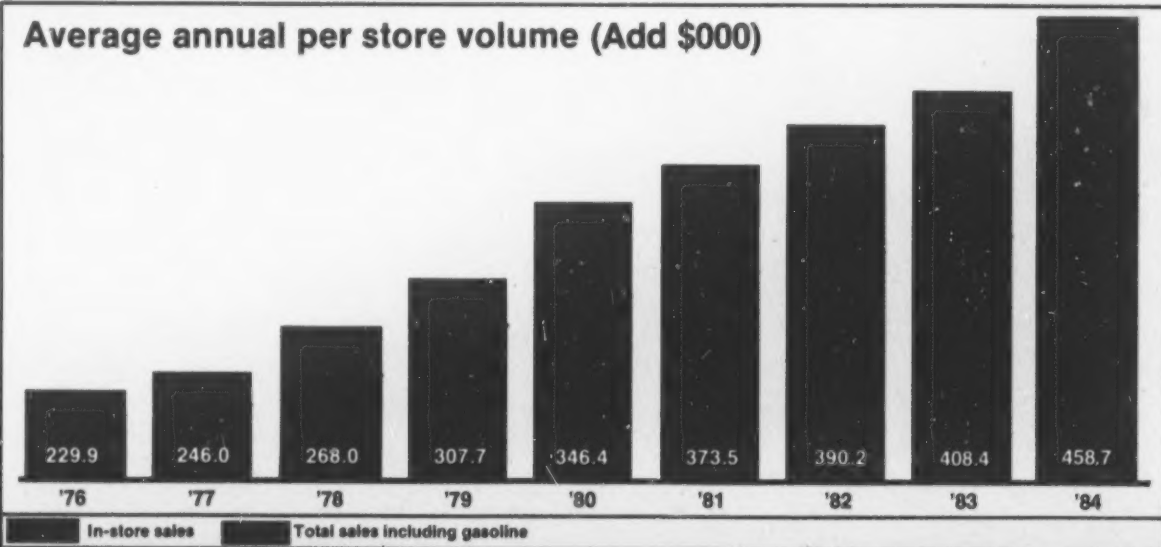
Sales by C-Stores 1973-1984 (Add \$000,000)



Total number of C-stores in U.S.



Average annual per store volume (Add \$000)





**FIND MONEY IN
YOUR BEER DEPARTMENT
YOU NEVER KNEW
WAS THERE.**

**COMPUTERIZE YOUR BEER DEPARTMENT WITH
THE NEW VERTIBRAND SCHEMATIC PRINTOUT.**



Now you can increase your beer department profits with the help of our new, one-page *printout*, custom-designed for your store.

The *printout* gives you a color-keyed schematic showing you exactly where each brand and package should be positioned according to your store's sales data. And the shelving is adjusted automatically to maximize your beer department space.

The *printout* also shows you how much of each brand to carry. So that you're never out of stock on the faster selling brands, or ever overstocked on the slow movers.

How successful has the Vertibrand Merchandising System been? Since it was introduced over 10 years ago, Vertibrand has increased beer sales in over 15,000 stores by as much as 27%. And now, the system is completely computerized.

To find out how the new Vertibrand *printout* can help your sales, write to Charles A. Whipple, V.P./National Retail Sales, Miller Brewing Company, 3939 West Highland Blvd., Milwaukee, WI 53201. It's absolutely free. So discover money in your beer department you never knew was there.



**MILLER BREWING COMPANY
THE LEADER IN
BEER MERCHANDISING**

Chevron, Texaco '84 Market Share Champs

Chevron and Texaco surged to the front of the pack to become the nation's leading gasoline marketers in 1984, bolstered by the megabuck acquisitions they made earlier in the year.

Chevron purchased Gulf Oil for \$13.2-billion and Texaco bought Getty Oil for \$10.2-billion in two of the great upheavals that shook the oil industry from top to bottom.

They shouldered aside Exxon, Amoco and Shell—the traditional leaders of the gasoline derby in recent years—by head-swimming margins. Chevron had a 69.7% increase in volume in 1984, Texaco 34.2%.

For Chevron, it was a spellbinding affair. It shot up from seventh place in 1983 to first in 1984 with a gross gasoline gallonage of 9.6-billion gal. Without the Gulf gallonage, it probably would have been way down in the pack again in 1984. For the record, however, the 9.6-billion gal. it vended last year represents an all-time high for any gasoline marketer in the U.S.

Texaco, which used to be the perennial leader but has been No. 4 or No. 5 in recent years, finished up with 8.7-billion gal.—about 1-billion gal. behind Chevron. Getty's string of stations added about 2-billion gal. to Texaco's 1984 total or else it too would have been somewhere around its usual position on down the line.

For both of the companies, however, the 1984 glories apparently will be one-shot affairs. Chevron already has spun off Gulf's southeastern properties in keeping with its agreement with the Federal Trade Commission. So, this gallonage and probably some other Gulf gasoline volumes will not be available for the California company's 1985 totals. The same holds true for Texaco which, under FTC man-

date, spun off Getty's marketing facilities on the East Coast and the Midwest-Mid-continent areas. The Texaco gallonage in 1985 should be much lower than 1984.

A surprising aspect of this share-of-market analysis developed by *National Petroleum News* is that it puts Exxon in a different perspective and ranks the company where most people have always thought it should be—consistently on top, or very close to it. Exxon was third in 1984 but only because the Chevron/Gulf and Texaco/Getty combinations were too much to overcome. It was No. 1, however, in 1983, 1982, 1981 and 1980. The probability is that it will regain its leadership at the end of this year.

The thing that bothered many people was how Exxon could be the industry's statistical goliath in so many directions and dimensions yet be ranked so poorly in gasoline sales. It would appear then that not all of Exxon's gasoline sales were being recognized and measured so that its totals dropped behind several others, notably Amoco and Shell.

Amoco and Shell, because of the Chev-

ron/Texaco skyrocketing, wound up fourth and fifth in 1984 gasoline volumes. A five-year overview shows, however, that Amoco consistently has been right behind Exxon in recent years, and Shell a close third.

NPN's share-of-market data is collected from the annual reports of the top oil companies. They are gross gallons—for both on-highway and off-highway use. But since off-highway consumption of gasoline averages only 3.2% to 3.3% of the gross total, it really isn't enough to have a major impact on the volumes and the standings.

The gross volumes are what the companies told their shareholders and the federal authorities in Washington were the amounts of gasoline they sold in 1984. They are bottom-line figures which accurately assess a given company's position and rank in the marketplace in gasoline sales.

To obtain the total gasoline sales for the entire industry, NPN used Federal Highway Administration data, which is based on the tax-paid gasoline sales reports pre-

Gasoline Consumption: On- Vs. Off-Highway use (billions of gal.)

Year	Highway Use	Off-Highway Use	Total Use	% Chng. Annually	% Off-Highway Use
1984 (a)	103.8	3.4	107.2	4.5%	3.2%
1983	99.4	3.2	102.6	.8	3.1
1982	98.5	3.3	101.8	(1.3)	3.2
1981	99.6	3.5	103.1	(1.6)	3.4
1980	101.2	3.6	104.8	(6.3)	3.4
1979	108.1	3.7	111.8	(3.5)	3.3
1978 (b)	112.2	3.6	115.8	—	3.1

(a) Estimated by NPN on basis of Federal Highway Administration data.

(b) Peak year of consumption.

Source: Federal Highway Administration, "Highway Statistics Annual." The totals in this table may vary slightly from other basic FHA tables because of some exclusions and additions.

The Gasoline Market: By Gross Gallonage and Relative Shares

Company	1984 (Total Sales Equal 107,219,431,000 gal.)				1983 (Total Sales Equal 104,231,431,000 gal.)			
	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '84 vs. '83	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '83 vs. '82
Chevron (a)	1	8.979%	9,627,240	69.7%	7	5.442%	5,672,100	4.5%
Texaco (b)	2	8.078	8,661,450	34.2	4	6.191	6,453,930	8.5
Exxon	3	7.292	7,818,300	.99	1	7.427	7,741,650	4.8
Amoco	4	6.877	7,373,730	2.5	2	6.897	7,189,770	(1.7)
Shell	5	6.820	7,312,420	2.6	3	6.839	7,128,450	1.3
Arco	6	5.733	6,147,330	8.7	8	5.427	5,656,770	13.9
Mobil	7	5.519	5,917,380	—	5	5.677	5,917,300	2.1
Sun	8	3.846	4,123,770	2.3	10	3.868	4,031,790	(4.4)
Sohio	9	3.675	3,939,810	(3.7)	9	3.926	4,093,110	9.4
Union	10	3.311	3,550,428	2.1	12	3.336	3,476,844	6.9
Phillips	11	3.117	3,341,940	2.8	11	3.118	3,249,960	(1.9)
Gulf (c)	—	—	—	—	6	5.574	5,910,070	(4.8)
Total	—	63.25 %	67,813,798	(N.C.)	—	63.73 %	66,424,840	3.1%

(a) Chevron acquired Gulf in early 1984, thus Chevron's gallonage for 1984 includes 10 months of Gulf gallonage.

(b) Texaco acquired Getty in early 1984, thus Texaco's gallonage for 1984 includes Getty's gallonage for 1984; Getty had volumes of 1.9-billion gal. in 1983; 1.9-billion in 1982; 1.9-billion in 1981 and 2.0-billion in 1980. Getty's gallonage in 1980-83 averaged 1.8% of the national market share.

(c) Gulf was acquired by Chevron in early 1984 and its 1984 gallonage is included in Chevron's.

(N.C.) Data not comparable inasmuch as Texaco's 1984 gallonage included that of Getty, which is not reflected in prior years of 1980-1983.

pared by all of the states and relayed to Washington. This, too, is an on-highway and off-highway accumulation, so the figures are justifiably comparable to allow share-of-market percentages to be worked out.

The total sales figures used for the 1980-1983 period are the revised and final figures issued by FHA. The 1984 marketplace total is an estimate by NPN based on preliminary FHA reports from 47 states and projections for the three that were missing. Industry sources considered it an

"agreeable ballpark figure which can't be too far off the mark."

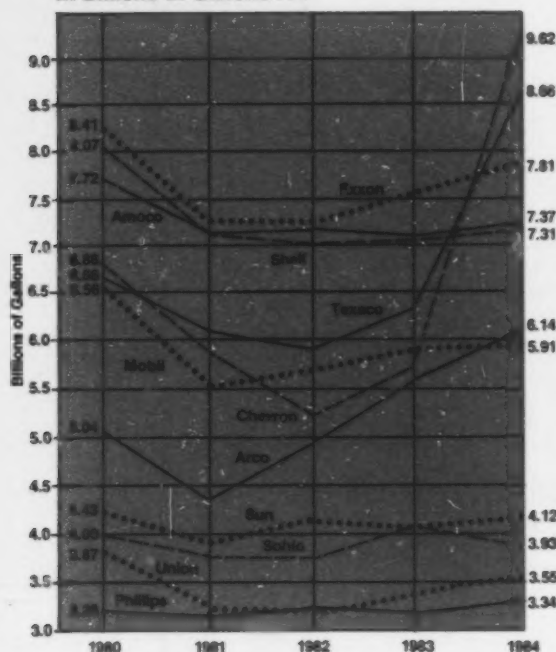
Besides the positioning of Exxon as the leading gasoline marketer, the NPN share-of-market report also includes some other unusual aspects. One is the inclusion for the first time of Standard Oil Co. of Ohio in the top 12 oil companies. Sohio used to be discounted and ignored because it had been confined to the state of Ohio. Later, via satellites BP and Boron, it penetrated other markets, especially the Atlantic seaboard. Now, with its 1985 acquisition of

the old Gulf properties in the Southeast, it can be assumed it will be a much stronger competitor in 1985 and thereafter. The gasoline sales figures, retrospectively, show that it has ranked no worse than 10th over the past five years.

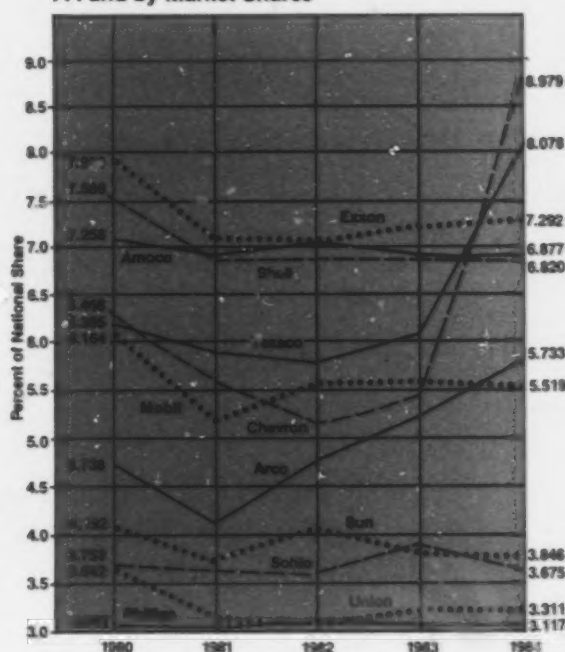
Another interesting sidelight was the fact that the top 12 oil companies marketed close to two out of every three gallons of gasoline sold in recent years. In 1980, the top 12 had 67% of the national market, but this figure eroded slowly so that in 1984 it was down to 63.2%.

THE BIG PICTURE

In Billions of Gallons . . .

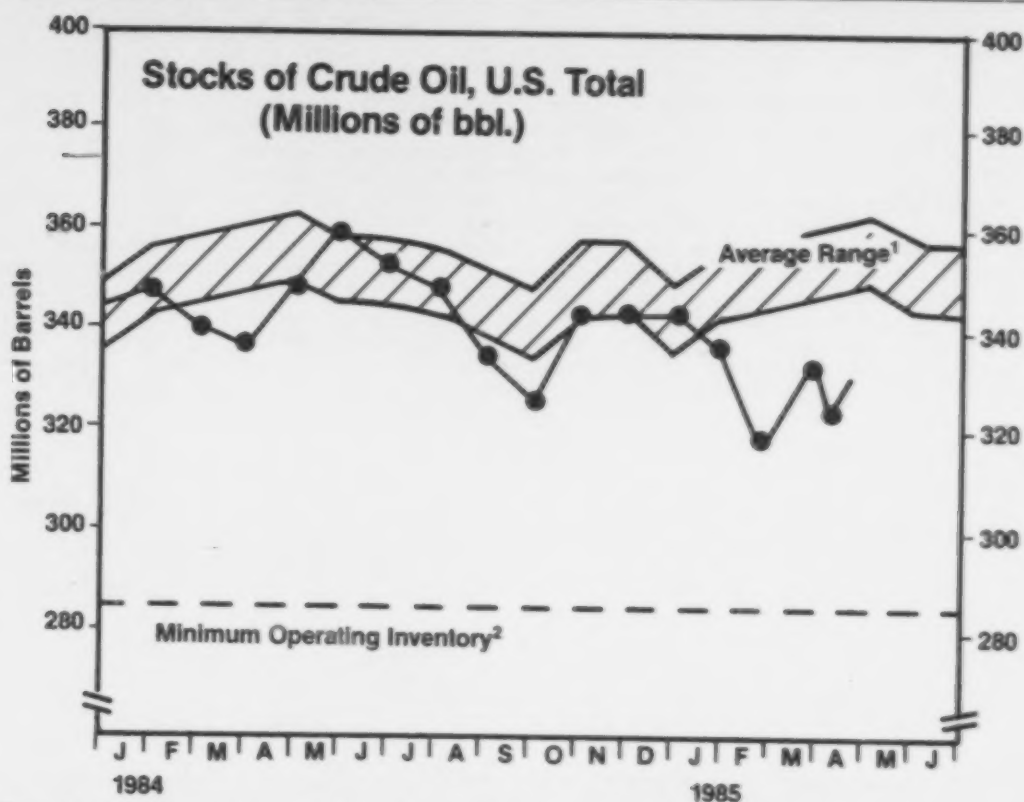


. . . and by Market Shares

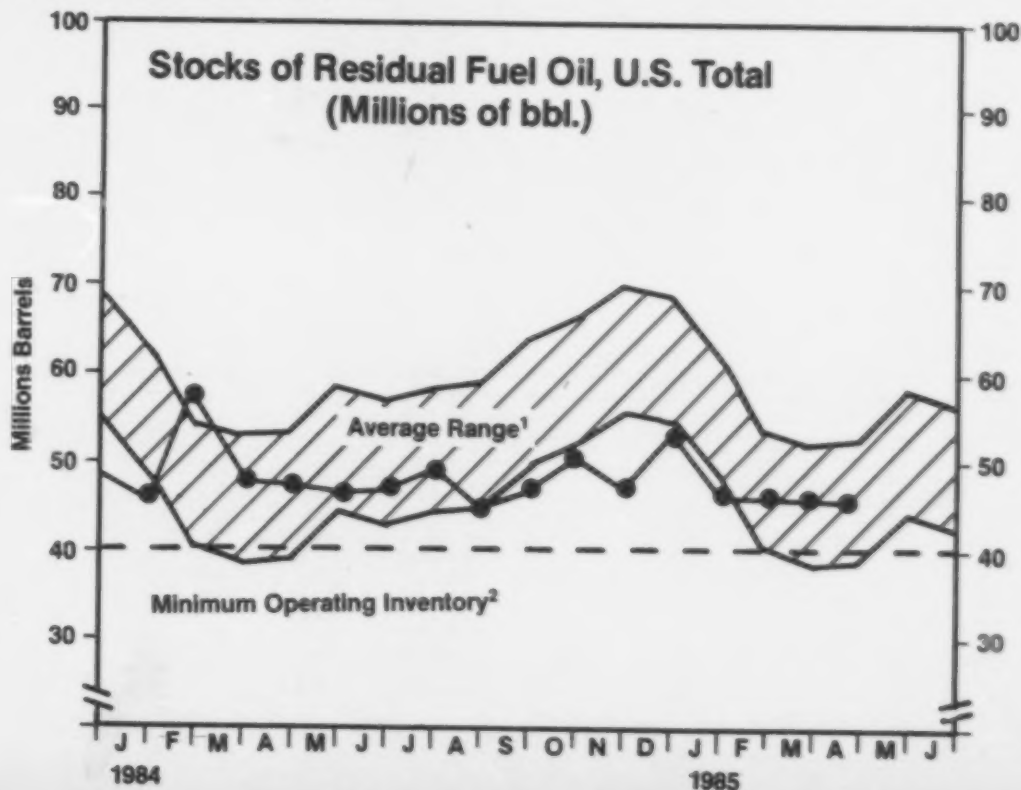


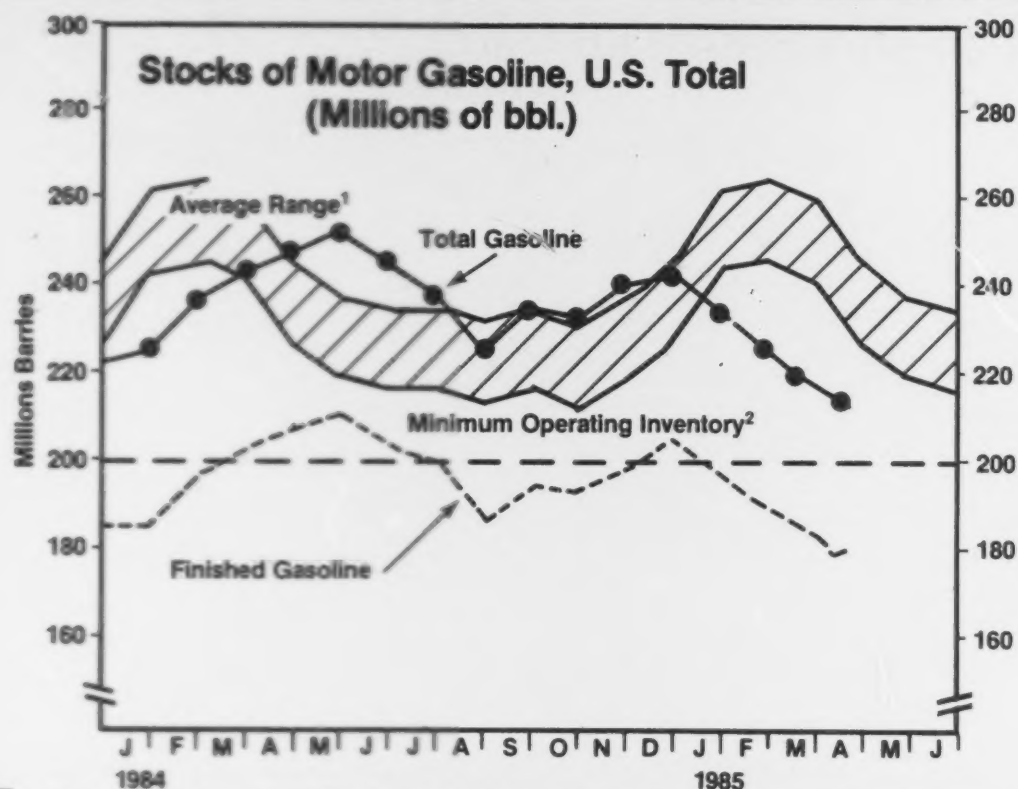
1982 (Total Sales Equal 102,747,085,000 gal.)				1981 (Total Sales Equal 104,150,406,000 gal.)				1980 (Total Sales Equal 106,448,704,000 gal.)			
Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '82 vs. '81	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '81 vs. '80	Rank	% Mkt. Shr.	(Add 000) Gallonage	
7	5.282%	5,426,820	(8.5%)	6	5.697%	5,933,710	(13.8%)	4	6.466%	6,883,170	
5	5.789	5,948,040	(4.0)	4	5.947	6,193,320	(7.1)	5	6.385	6,668,510	
1	7.192	7,389,080	.06	1	7.050	7,343,070	(12.8)	1	7.906	8,416,170	
2	7.115	7,312,410	.06	2	6.977	7,266,420	(6.0)	3	7.258	7,726,320	
3	6.848	7,036,470	(1.5)	3	6.918	7,205,100	(10.8)	2	7.589	8,078,910	
8	4.834	4,916,920	11.0	8	4.298	4,476,360	(11.2)	8	4.738	5,043,570	
6	5.640	5,794,740	4.1	7	5.343	5,564,790	(15.2)	6	6.164	6,561,240	
9	4.103	4,215,750	7.4	9	3.768	3,924,480	(11.4)	9	4.162	4,430,370	
10	3.641	3,740,520	(.08)	10	3.261	3,771,180	(2.3)	10	3.759	4,001,130	
11	3.165	3,251,493	3.3	12	3.204	3,337,341	(13.9)	12	3.642	3,876,957	
12	3.223	3,311,280	(2.6)	11	3.076	3,203,970	(2.3)	11	3.082	3,280,620	
4	5.940	6,103,340	(.07)	5	5.902	6,147,330	(3.1)	7	5.962	6,346,620	
	62.72 %	64,446,843	.12		61.80 %	64,367,071	(9.7)		56.99 %	71,313,587	

Sources: Oil company annual reports and statistical supplements, plus special direct reports to NPN. Gross gallonage totals for each year are those of Federal Highway Administration except 1984 which is FHA data for 47 states and an NPN estimate for the other three. FHA data is for all uses—on- and off-highway. Since the off-highway consumption has averaged only 3.25% over the past six years, it is not considered significant in the market share ratios.



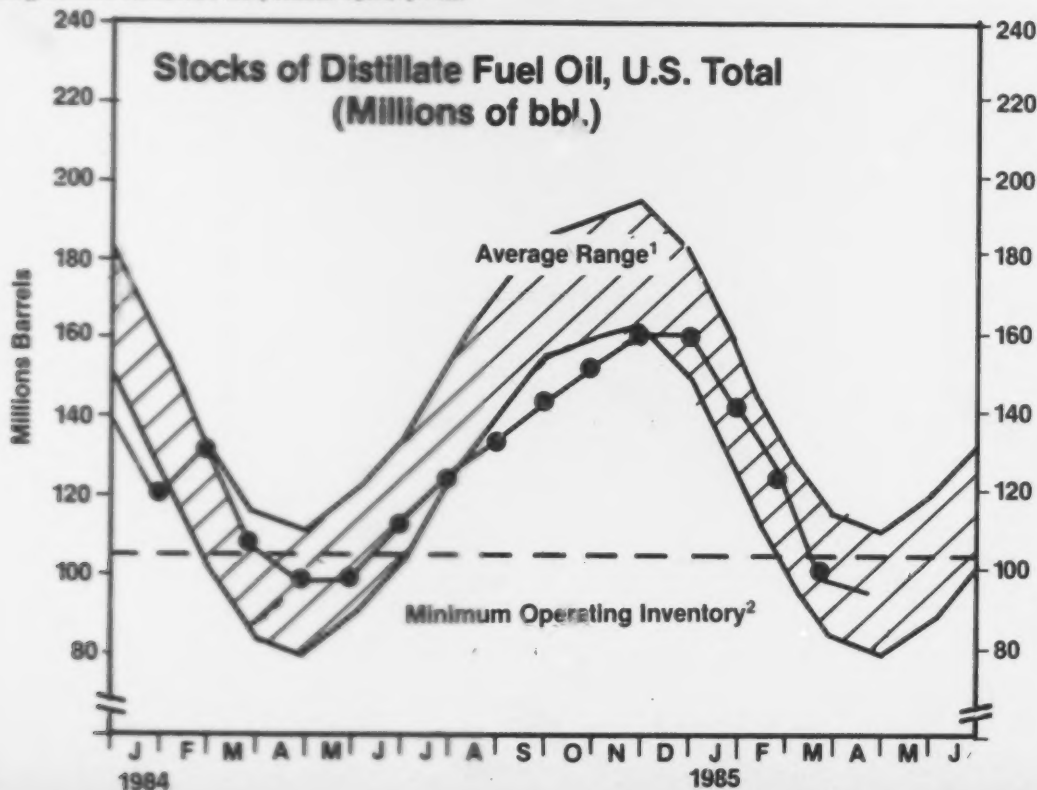
Crude Stocks at Primary Levels include those held at refineries, in pipelines, and in lease tanks, but do not include those held in the Strategic Petroleum Reserve operated by the U.S. Government. (1) The average level and width of average range are based on three years of monthly data for the period of July 1981 and June 1984. The seasonal pattern is based on seven years of monthly data. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels late in 1983. Source: Department of Energy, Weekly Statistical Reports, April 1985.





Product stocks at the Primary Level include those held at refineries, in pipelines, and at major bulk terminals. They do not include stocks held in secondary distribution facilities such as jobber tanks, consumer tanks, and/or barges designed for consumer markets. (1) The average level and width of average range are based on three years of monthly data for the period of July 1981 through June 1984. The seasonal pattern is based on seven years of monthly data. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels in late 1983.

Source: Energy Information Administration, Weekly Statistical Reports, April 1985.



Stocks of Motor Gasoline

(Add 000,000 bbl.)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Finished Gasoline	185.5	196.6	202.8	207.4	210.7	204.1	200.1	186.6	194.5	193.2	198.4	205.4
Blending Components	39.9	40.5	40.5	40.6	42.1	41.3	38.4	38.5	40.1	39.4	41.6	38.1
Total Gasoline	225.5	237.1	243.2	248.0	252.7	245.4	238.5	225.1	234.6	232.5	240.0	243.5
East Coast	61.4	65.2	65.2	66.9	71.1	69.3	72.2	66.0	64.9	63.3	63.5	67.8
Midwest	63.2	68.4	71.1	71.4	68.3	65.5	64.7	62.7	66.9	65.5	67.5	72.4
Gulf Coast	62.6	66.2	71.1	72.5	73.0	71.0	65.2	63.2	69.6	69.6	71.3	63.6
Rocky Mountain	8.4	8.7	9.0	8.7	8.8	7.9	7.5	6.4	6.2	6.3	7.0	7.9
West Coast	29.9	28.6	26.8	28.5	31.5	31.7	29.0	26.9	26.8	27.9	30.7	31.8
1983 (a)												
Finished Gasoline	207.2	206.5	182.7	182.8	185.3	182.8	189.8	184.8	189.3	187.1	196.0	185.5
Blending Components	42.5	43.8	40.4	37.9	37.8	39.7	40.7	41.5	39.8	40.3	39.8	36.9
Total Gasoline	249.7	250.2	223.0	220.7	223.1	222.6	230.5	226.3	229.1	227.4	235.8	222.4
East Coast	70.2	66.0	55.3	60.8	63.1	61.3	64.4	62.6	64.1	61.7	63.5	63.8
Midwest	75.2	77.4	68.3	65.3	63.7	63.7	64.2	64.4	65.4	64.4	68.4	63.7
Gulf Coast	63.9	65.5	65.4	62.6	63.9	64.2	65.3	62.4	64.8	67.9	69.9	60.1
Rocky Mountain	9.4	9.4	8.3	7.9	7.4	6.7	6.4	5.9	5.9	6.3	7.4	7.7
West Coast	31.0	31.9	25.8	24.1	25.0	26.6	30.3	30.8	28.9	27.1	26.6	27.0

Stocks of Distillate Fuel Oil

(Add 000,000 bbl.)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Total U.S.	119.5	132.2	109.6	97.8	98.2	112.9	124.5	133.5	143.2	152.4	160.8	161.1
East Coast	43.4	54.4	37.3	29.8	32.5	39.9	45.3	49.2	57.5	71.8	74.9	72.8
Midwest	37.1	37.0	33.5	30.2	27.1	31.7	36.2	39.3	38.6	36.4	37.5	43.7
Gulf Coast	24.7	26.8	24.2	23.0	23.6	26.1	28.2	30.6	32.5	29.9	33.0	29.0
Rocky Mountain	3.4	3.2	3.4	3.3	3.4	3.5	3.6	3.5	3.3	3.2	3.5	3.7
West Coast	10.8	10.8	11.3	11.5	11.5	11.6	11.3	11.0	11.2	11.0	11.9	11.9
1983 (a)												
Total U.S.	167.6	148.2	118.1	103.1	108.9	113.7	130.7	142.4	154.0	162.6	161.2	140.3
East Coast	71.1	55.5	38.0	31.8	36.9	41.0	50.9	61.7	67.5	74.6	70.7	57.7
Midwest	47.1	46.5	39.0	33.2	30.4	29.6	33.3	36.3	38.6	40.3	42.8	40.2
Gulf Coast	31.2	28.9	26.7	26.0	28.7	29.7	32.4	30.8	34.4	34.4	33.8	27.8
Rocky Mountain	4.1	4.0	3.3	2.8	2.9	2.8	3.0	3.0	2.7	2.6	2.8	3.3
West Coast	14.0	13.4	11.1	9.3	9.9	10.6	11.0	10.6	10.8	10.7	11.2	11.3

Stocks of Residual Fuel Oil

(Add 000,000 bbl.)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Total U.S.	45.4	57.6	47.6	47.4	46.3	46.8	49.2	44.7	47.0	50.8	47.2	53.2
East Coast	21.0	30.8	24.4	22.7	23.1	21.9	24.7	21.9	25.0	26.8	24.2	29.1
Midwest	3.6	4.2	4.1	3.5	3.9	3.6	3.5	3.6	3.5	3.8	3.7	3.5
Gulf Coast	11.8	12.9	9.9	10.9	10.1	11.2	9.8	9.2	9.8	10.2	10.4	11.2
Rocky Mountain	0.4	0.4	0.5	0.5	0.6	0.5	0.6	0.5	0.5	0.7	0.6	0.6
West Coast	8.7	9.4	8.7	9.7	8.6	9.6	10.6	9.4	8.1	9.4	8.3	8.7
1983 (a)												
Total U.S.	60.5	53.3	46.3	46.6	51.0	49.9	51.9	48.3	49.7	51.2	54.2	48.5
East Coast	29.8	25.3	20.6	20.2	23.8	24.2	25.3	23.8	23.5	25.2	29.3	24.8
Midwest	5.0	4.4	3.6	3.4	3.5	3.7	3.7	3.7	3.5	3.8	3.6	4.0
Gulf Coast	16.2	14.0	12.8	13.4	14.5	13.1	13.7	13.2	13.8	13.5	12.3	11.0
Rocky Mountain	0.5	0.4	0.4	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.5
West Coast	8.9	9.1	8.9	9.0	8.5	8.4	8.6	7.1	8.5	8.3	8.5	8.2

(a) Methodology and reporting procedures were changed in 1983, thus making comparisons with earlier data not practical.
Source: Energy Information Administration, Weekly Petroleum Status Reports.

Technology right from the start.



From design to manufacturing to quality control, we use the latest technology to make sure OEMs get top performance out of today's Freedom Batteries.

Design. Freedom is a proven maintenance-free design in automotive batteries. A lifetime supply of electrolyte means you never have to add water. And Delco Freedom Batteries provide dependable starts in all kinds of weather.

Manufacturing. The heart of the Freedom Battery is an expanded

lead calcium power grid, made with an exclusive Delco Remy manufacturing process. The Freedom power grid contains no antimony to cause excessive gassing and water loss.

Quality Control. Freedom Batteries are tested and retested in every step of the manufacturing process. Each test is monitored by a central computer for accurate "Statistical Process Control." It's our state-of-the-art testing for our state-of-the-art battery.

Delco Remy continues its worldwide reputation as a leader

in complete electrical systems design.

Start off with the right technology. In design. In manufacturing. In quality control. Specify Delco Freedom Batteries for the cars and trucks you build.

Delco Remy, Division of General Motors. World headquarters: Anderson, Indiana 46018. Offices in Milton Keynes, England; Russelsheim, W. Germany; Gennevilliers, France; Milan, Italy; Tokyo, Japan.

A world leader in automotive electrical systems.



Refinery and Bulk Terminal Stocks By States and PAD Regions—1984

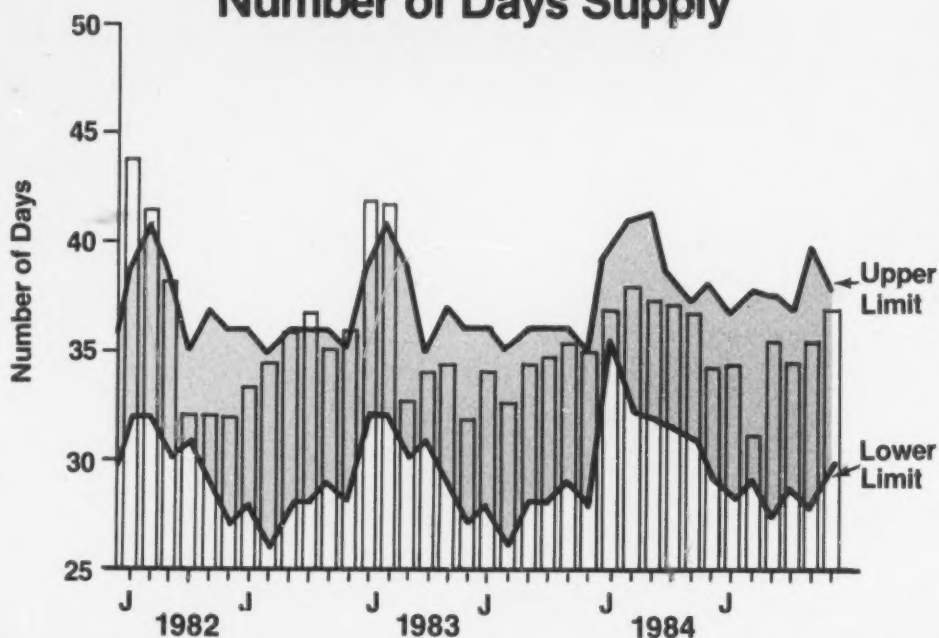
(Add 000 bbl.)

State	Leaded Motor Gasoline	Unleaded Motor Gasoline	Kerosine	Distillate Fuel Oil	Residual Fuel Oil
PAD District 1 Total	20,543	27,547	5,595	63,895	29,087
Connecticut	571	964	110	2,911	922
Delaware, D.C., Maryland	830	1,511	645	5,361	2,987
Florida	2,451	3,237	312	2,303	1,048
Georgia	1,496	1,616	118	1,401	250
Maine	326	609	113	1,421	396
Massachusetts	1,028	1,083	62	4,358	721
New Hampshire, Vermont	100	115	w	903	187
New Jersey	2,998	4,967	1,124	17,726	12,410
New York	2,792	3,677	587	9,904	5,389
North Carolina	1,455	1,519	764	1,952	466
Pennsylvania	3,443	4,587	1,027	8,785	2,182
Rhode Island	281	545	w	1,790	127
South Carolina	912	1,067	279	1,403	546
Virginia	1,606	1,781	401	3,238	1,399
West Virginia	241	229	40	239	57
PAD District 2 Total	23,173	22,901	2,804	33,737	3,547
Illinois	4,298	4,973	358	6,464	822
Indiana	3,168	2,974	564	4,744	552
Iowa	988	849	w	1,570	w
Kansas	1,772	1,622	75	2,406	74
Kentucky	1,038	1,234	215	1,571	275
Michigan	2,354	2,245	216	3,018	344
Minnesota	1,383	1,026	w	2,362	284
Missouri	952	770	w	978	w
Nebraska	395	150	0	391	0
North & South Dakota	413	283	0	1,025	w
Ohio	2,608	3,256	734	3,882	418
Oklahoma	1,244	1,144	279	1,734	184
Tennessee	1,251	1,203	121	1,324	206
Wisconsin	1,309	1,172	w	2,268	97
PAD District 3 Total	12,775	15,136	1,733	19,357	11,221
Alabama	1,006	937	84	956	656
Arkansas	223	180	w	192	59
Louisiana	1,693	3,046	677	3,747	4,603
Mississippi	1,029	1,236	17	2,121	486
New Mexico	298	205	w	263	4
Texas	8,526	10,532	941	12,078	5,413
PAD District 4 Total	2,509	1,892	25	3,089	608
Colorado	629	626	0	547	152
Idaho	263	106	0	253	0
Montana	614	425	w	989	109
Utah	326	269	0	625	242
Wyoming	677	466	w	675	105
PAD District 5 Total	10,014	11,361	284	11,017	8,596
Alaska	503	351	w	1,349	w
Arizona	410	294	w	378	0
California	5,578	7,566	197	5,314	6,146
Hawaii	274	234	0	296	w
Nevada	155	235	w	187	w
Oregon	971	751	w	1,181	302
Washington	2,123	1,930	w	2,312	1,121
U.S. Total	69,014	79,837	10,531	130,895	53,049

W = Withheld to avoid disclosure of individual company data.

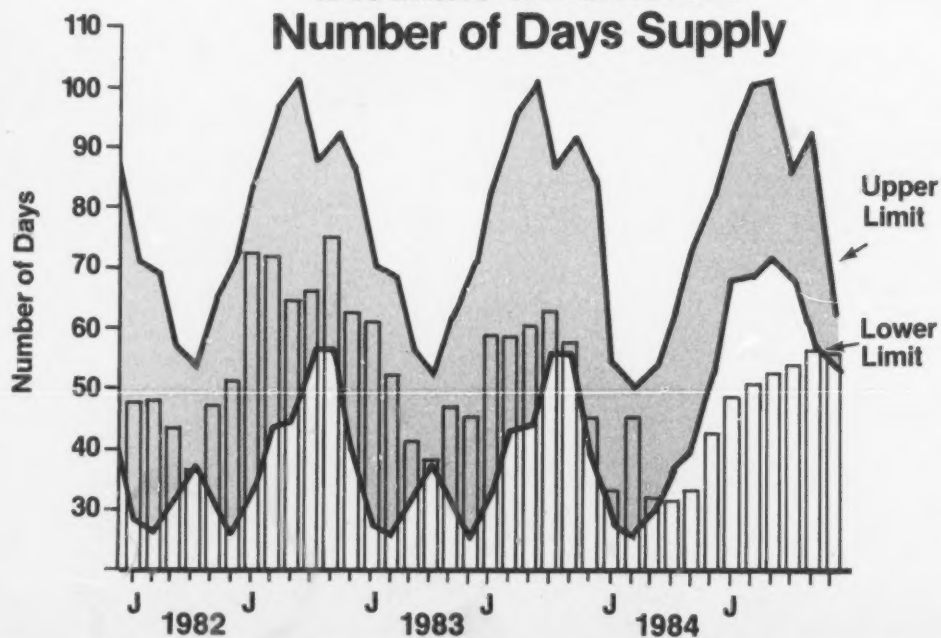
Source: Energy Information Administration, December 1984, published in February 1985.

Gasoline Inventories Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

Distillate Inventories Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

Petroleum Products Supplied

(Millions of b/d)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Motor Gasoline	6.3	6.2	6.5	6.7	6.9	7.1	6.8	7.1	6.6	6.7	6.8	6.6
Jet Fuel	1.2	1.1	1.1	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.2	1.2
Distillate Fuel Oil	3.5	2.8	3.3	2.9	2.8	2.6	2.5	2.6	2.7	2.8	2.8	2.8
Residual Fuel Oil	2.0	1.6	1.6	1.4	1.2	1.3	1.2	1.3	1.2	1.1	1.4	1.2
Other	3.8	3.6	3.5	3.4	3.5	3.6	3.8	3.9	3.7	3.8	3.5	3.6
Total	16.7	15.4	16.0	15.5	15.6	15.7	15.5	16.1	15.3	15.6	15.6	15.4

1983

Motor Gasoline	6.1	6.0	6.8	6.5	6.6	7.0	6.8	6.9	6.7	6.6	6.6	6.8
Jet Fuel	1.0	1.1	1.0	1.0	1.0	1.1	1.1	1.1	1.1	1.0	1.0	1.2
Distillate Fuel Oil	2.8	2.8	2.9	2.7	2.4	2.5	2.3	2.5	2.6	2.6	2.9	2.4
Residual Fuel Oil	1.6	1.6	1.6	1.4	1.3	1.3	1.3	1.4	1.4	1.2	1.4	1.6
Other	3.3	3.4	3.2	3.1	3.2	3.4	3.6	3.6	3.8	3.5	3.7	3.7
Total	14.7	14.8	15.5	14.7	14.5	15.3	15.0	15.5	15.5	15.0	15.5	16.7

1982

Motor Gasoline	6.0	6.2	6.5	6.9	6.7	6.8	6.8	6.8	6.5	6.4	6.6	6.5
Jet Fuel	1.0	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1
Distillate Fuel Oil	3.5	3.1	2.9	3.0	2.4	2.5	2.1	2.2	2.5	2.6	2.5	2.3
Residual Fuel Oil	2.2	2.3	1.9	1.9	1.6	1.5	1.6	1.5	1.5	1.5	1.6	1.6
Other	3.5	3.3	3.3	3.2	3.2	3.2	3.4	3.5	3.5	3.4	3.3	3.4
Total	16.1	16.0	15.6	16.0	14.8	15.0	14.8	14.8	15.0	14.9	15.0	15.5

Petroleum Products Imported

(Millions of b/d)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Finished Motor Gasoline	233	303	343	308	329	272	247	243	333	283	286	308
Jet Fuel	60	112	45	95	55	44	34	95	30	49	36	28
Distillate Fuel Oil	270	458	115	220	252	266	198	263	285	424	308	190
Residual Fuel Oil	1,061	1,107	633	637	554	676	596	572	596	461	588	627
Other Petroleum Products*	695	711	662	642	799	635	665	620	636	789	766	628

1983

Finished Motor Gasoline	153	128	186	255	305	277	302	250	279	330	269	224
Jet Fuel	27	8	35	15	29	26	30	40	44	49	23	24
Distillate Fuel Oil	68	59	42	73	147	179	267	301	259	260	203	221
Residual Fuel Oil	691	647	686	753	738	677	684	739	706	638	780	649
Other Petroleum Products*	535	617	450	512	511	591	586	602	631	535	599	703

1982

Finished Motor Gasoline	128	133	183	185	182	230	225	291	223	185	211	178
Jet Fuel	10	82	39	47	31	3	31	26	30	20	40	7
Distillate Fuel Oil	97	132	48	59	74	102	125	80	61	91	145	108
Residual Fuel Oil	831	956	912	788	742	652	657	550	872	783	836	747
Other Petroleum Products*	573	533	427	449	474	504	604	445	592	667	650	564

*Includes imports of kerosine, unfinished oils, motor gasoline blending components, liquefied petroleum gases and other oils.
Source: Energy Information Administration, Weekly Petroleum Status Reports.

U.S. Crude Oil Production—1983-1974

(Thousands of b/d)

	1983	1982	1981	1980	1979	1978	1977	1976	1975	1974
PAD District 1										
Florida	53.4	70.2	95.3	117.2	129.2	130.2	127.8	121.5	114.7	99.6
New York	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4	2.5
Pennsylvania	11.7	11.7	10.2	7.2	7.9	7.9	7.4	8.3	9.0	9.5
Virginia	0.2	0.1	**	**	**	**	**	**	**	**
West Virginia	9.9	8.9	9.5	6.4	6.6	6.5	6.9	6.9	6.8	7.3
Total	77.5	93.2	117.3	133.1	146.0	146.9	144.4	139.0	132.9	118.9
PAD District 2										
Illinois	80.0	75.9	66.0	62.0	59.7	64.0	70.2	71.8	71.4	75.5
Indiana	14.6	15.2	12.9	13.6	12.9	12.8	14.6	12.7	12.7	13.5
Kansas	196.1	193.2	180.3	164.3	156.2	155.0	157.5	160.4	161.9	169.0
Kentucky	21.6	20.2	17.9	16.2	15.1	15.7	18.0	20.4	20.7	21.5
Michigan	86.9	86.2	89.5	97.8	95.5	95.0	90.3	83.1	66.9	49.4
Nebraska	17.5	18.8	18.3	17.0	16.6	16.1	16.4	16.9	16.8	18.1
North Dakota	138.9	129.5	124.4	110.2	84.7	68.0	63.8	59.4	56.0	54.0
Ohio	41.0	39.9	37.1	35.3	32.8	30.6	28.4	27.3	26.2	24.9
Oklahoma	434.5	434.6	422.1	410.2	393.6	412.2	428.4	441.0	446.9	487.1
South Dakota	3.2	3.2	2.7	2.1	2.3	2.4	1.7	1.2	1.3	1.3
Other (a)	3.6	3.7	3.2	2.4	1.9	1.8	2.4	1.8	2.0	2.2
Total	1,037.9	1,020.4	974.4	931.1	871.3	873.6	891.7	896.0	882.8	916.5
PAD District 3										
Alabama	51.4	54.8	56.6	60.5	52.5	54.3	50.0	40.2	36.9	36.5
Arkansas	51.6	51.6	50.3	49.8	51.7	55.7	55.3	49.5	44.2	45.3
Louisiana	1,313.9	1,255.9	1,231.0	1,281.8	1,341.6	1,459.6	1,542.2	1,657.1	1,783.1	2,020.0
Mississippi	86.2	90.5	93.7	98.2	102.3	115.1	117.9	125.9	127.7	139.1
New Mexico	205.9	194.6	196.1	205.1	218.2	228.4	239.0	251.7	260.5	270.4
Texas	2,473.0	2,535.1	2,589.4	2,670.6	2,789.3	2,942.6	3,117.5	3,250.0	3,347.8	3,457.9
Total	4,182.0	4,182.5	4,217.1	4,366.0	4,555.6	4,855.7	5,121.9	5,374.4	5,600.2	6,969.2
PAD District 4										
Colorado	79.6	83.7	83.0	81.4	88.5	100.8	108.1	106.5	104.4	102.8
Montana	80.1	84.7	84.4	80.0	82.1	83.5	89.5	89.7	90.0	94.7
Utah	80.9	61.5	70.9	68.2	76.0	85.9	90.7	93.7	115.9	107.8
Wyoming	324.1	324.1	357.7	345.2	361.3	376.4	373.9	366.5	372.5	383.5
Total	564.7	554.0	596.0	574.8	607.9	646.6	662.2	656.4	682.8	688.8
PAD District 5										
Alaska	1,713.8	1,695.6	1,609.1	1,616.6	1,400.9	1,229.1	463.6	173.2	191.3	193.4
Arizona	0.6	0.9	1.0	1.1	1.3	1.1	1.2	1.4	1.7	2.0
California	1,108.7	1,100.2	1,054.7	975.2	965.1	951.2	957.8	890.8	882.7	885.0
Nevada	2.2	1.7	1.9	2.4	3.4	3.2	1.8	0.4	0.3	0.4
Total	2,825.3	2,798.4	2,666.7	2,595.3	2,370.7	2,184.6	1,424.4	1,065.8	1,076.0	1,080.8
Total U.S.	8,688	8,648	8,571	8,600	8,551	8,707	8,244	8,131	8,374	8,774

**Less than 100 barrels per day.

(a) Missouri and Tennessee.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1984."

Quality. **That's why a company from Oil City, Pennsylvania** **has made a name for itself in the world.**

You'll notice we didn't say "oil company." Because while Quaker State is the leading motor oil marketer in America, we're much more.

Tradition.

We're what we've been for over seventy years—a producer of premium quality motor oil and lubricants. That tradition has continued straight through since 1911 with the use of premium Pennsylvania Grade Crude Oil in our refining process.

Innovation.

We're innovators. Quaker State recently led the motor oil industry by introducing new bottle packaging that has helped revolutionize the industry. Now, many other major motor oil

marketers in America have or plan to have their product repackaged.

Multinational.

We grew up in Oil City, and we'll always have our home base there. But as we grew,

and a full range of Quaker State branded automotive aftermarket products, we're lighting, coal and insurance, too. As part of its natural growth and use of its resources, Quaker State has expanded over the years to include subsidiaries like the Truck-Lite Company, the Do-Ray Lamp Company, Valley Camp Coal Company and the Heritage Insurance Group.

Quality.

Whatever we do, there is a corporate policy at work behind it: to do it the best

way we know how.

There is no secret to our success, it's there for everyone to see. And benefit from.

Quaker State Oil Refining Corporation,
P.O. Box 989, Oil City,
Pennsylvania 16301.



we established distribution throughout the United States and in many areas of the world such as Canada, Mexico, and Western Europe.

Diversified.

In addition to motor oil

Quaker State. The Big Q stands for quality.
Always has. Always will.

Domestic Supply Trend

(Add 000,000 bbl.)

Year	All products	Gasoline	Kerosine (a)	Distillate	Residual	LPG	Lubes	Other
1984 (b)	5,752	2,451	390	1,042	500	577	56	736
1983	5,585	2,417	353	982	519	551	53	710
1982	5,568	2,386	339	977	618	443	51	754
1981	5,861	2,404	342	1,032	762	407	58	856
1980	6,932	2,536	397	1,389	1,033	414	58	1,105
1979	6,758	2,568	388	1,210	1,032	456	66	1,036
1978	6,879	2,705	377	1,253	1,103	358	63	1,020
1977	6,710	2,633	350	1,223	1,121	369	58	956
1976	6,391	2,567	351	1,147	1,025	381	56	864
1975	5,958	2,436	347	1,041	899	362	50	823
1973	6,317	2,453	386	1,124	1,030	404	59	851
1971	5,552	2,213	385	971	838	369	49	727
1970	5,364	2,131	358	927	804	363	50	731
1965	4,202	1,720	220	776	587	307	47	545
1960	3,610	1,512	132	685	559	227	43	427

(a) Kerosine includes jet fuel; (b) Preliminary.

Source: Petroleum Supply Monthly, Energy Information Administration, December 1984, published in February 1985.

U.S. Estimated Petroleum Balance—1984

(Add 000 b/d)

Products Supplied/Supply From Primary Storage (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Products Supplied:												
Motor gasoline, total	6,702	6,622	1.2%	6,720	6,680	0.6%	6,894	6,810	1.2%	6,899	6,687	3.2%
Finished leaded gasoline	2,715	2,975	(8.7)	2,555	2,889	(11.6)	2,746	3,052	(10.0)	2,883	3,074	(6.2)
Finished unleaded gasoline	3,987	3,647	9.3	4,165	3,791	9.9	4,148	3,758	10.4	4,016	3,613	11.2
Naphtha-Jet	225	207	8.7	231	192	20.3	250	212	17.9	221	209	5.7
Kerosine-Jet	954	839	13.7	1,008	872	15.6	935	864	8.2	923	829	11.3
Distillate Fuel oil	2,874	2,690	6.8	2,924	2,950	(0.9)	2,608	2,445	6.7	2,801	2,523	11.0
Residual Fuel oil	1,358	1,421	(4.4)	1,179	1,397	(15.6)	1,281	1,350	(5.1)	1,322	1,346	(1.8)
All other oils	3,870	3,619	6.9	3,900	3,826	1.9	3,944	3,838	2.8	3,824	3,329	8.9
Reclassified	-211	-166	27.1	-184	-184	—	-228	-184	23.9	-185	-97	90.7
Total domestic products supplied	15,772	15,232	3.5	15,778	15,773	0.3	15,684	15,335	2.3	15,805	14,826	5.3
Exports	677	739	(8.4)	636	631	0.8	672	639	5.2	709	811	(12.6)
Total Products Supplied	16,449	15,971	3.0	16,414	16,364	0.3	16,356	15,974	2.4	16,514	15,637	4.3
Supply:												
Domestic production												
Crude oil	8,811	8,688	1.4	8,831	8,644	2.2	8,790	8,699	1.0	8,719	8,691	0.3
Natural gas liquids	1,644	1,559	5.5	1,701	1,596	6.6	1,836	1,567	4.4	1,587	1,507	5.3
Other supply	861	654	34.7	885	605	46.3	652	569	14.6	1,044	765	36.5
Total domestic supply	11,316	10,901	4.0	11,417	10,845	5.3	11,078	10,835	2.2	11,350	10,963	3.5
Imports:												
Crude oil, total	3,201	3,096	3.6	3,280	3,143	4.4	3,361	3,790	(11.3)	3,497	3,123	12.0
Canadian	328	274	19.7	323	294	9.9	274	301	(9.0)	407	252	61.5
Other	2,873	2,822	1.8	2,957	2,849	3.8	3,087	3,489	(11.5)	3,090	2,871	7.6
Products, total	1,973	1,732	14.9	1,921	1,835	4.7	1,765	1,907	(7.4)	1,934	1,696	14.0
Residual Fuel oil	663	699	(5.2)	514	688	(25.3)	575	710	(19.0)	668	723	(7.6)
Other	1,315	1,023	28.5	1,407	1,147	22.7	1,190	1,197	(0.6)	1,226	973	30.1
Total imports	5,187	4,819	7.7	5,201	4,978	4.5	5,126	5,697	(10.0)	5,431	4,819	12.7
Total supply	16,503	15,719	5.1	16,618	15,823	5.0	16,204	16,532	(2.0)	16,781	15,782	6.3

(a) Preliminary for 1984.

Source: American Petroleum Institute, Monthly Statistical Reports.

U.S. Refinery Operations

(Add 000 b/d)

Refinery Operations (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Input to crude oil distillation units	12,225	11,947	2.3%	12,115	11,869	2.1%	12,426	12,565	(1.1)%	12,364	12,139	1.9%
Operable capacity	16,081	16,660	(3.5)	16,047	16,337	(1.8)	16,078	16,630	(3.3)	16,219	16,850	(3.7)
Refinery Utilization (%)	76.0%	71.7%	6.0	75.5%	72.7%	3.9	77.3%	75.6%	2.2	76.2%	72.0%	5.8
Crude oil runs	12,057	11,685	3.2	11,953	11,670	2.4	12,282	12,330	(0.4)	12,166	11,839	2.8

(a) Preliminary for 1984 data.

Source: American Petroleum Institute, Monthly Statistical Reports.

Crude and Product Inventories

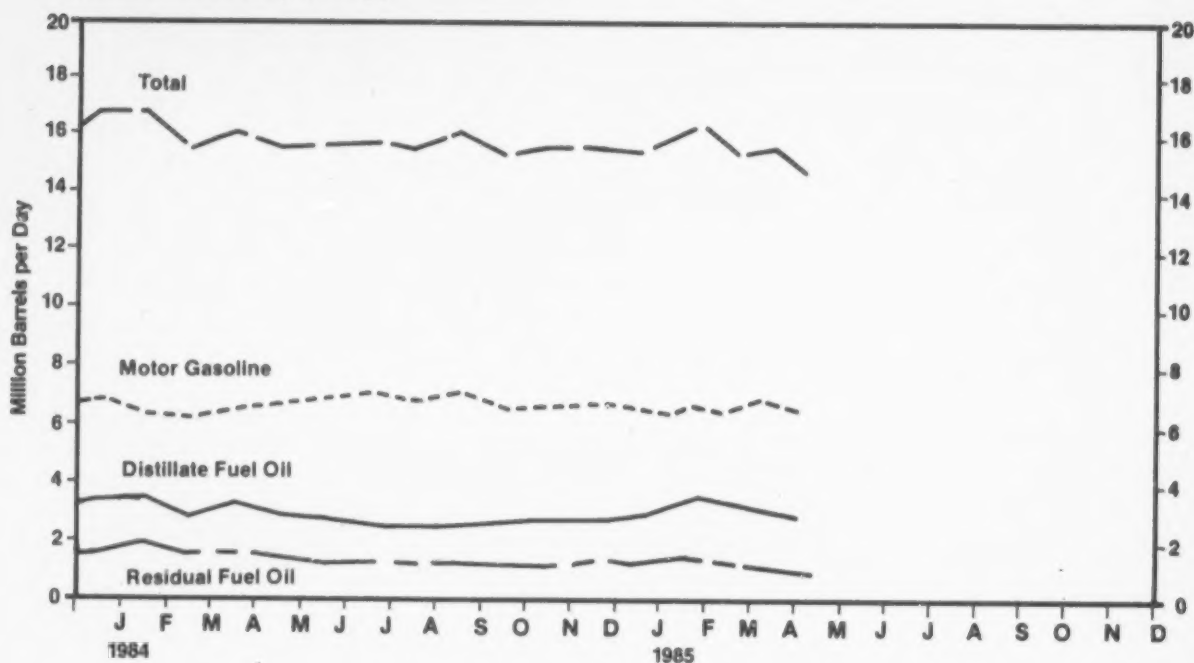
(Add 000,000 bbl.)

Stocks (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Crude oil (b)	337.0	343.9	(2.0)%	337.0	343.9	(2.0)%	330.4	346.7	(4.7)%	356.1	350.5	1.6%
Unfinished oils	96.7	108.0	(10.5)	96.7	108.0	(10.5)	109.9	112.9	(3.5)	109.0	110.8	(1.6)
Total motor gasoline	241.0	222.4	8.4	241.0	222.4	8.4	229.8	229.1	(0.1)	249.6	222.6	12.1
Finished leaded motor gasoline	91.5	84.1	(8.8)	91.5	84.1	(8.8)	84.5	84.6	(0.1)	98.1	95.1	3.2
Finished unleaded motor gasoline	110.4	91.4	20.8	110.4	91.4	20.8	105.2	94.7	11.1	109.4	87.7	24.7
Naphtha-Jet	7.1	6.3	12.7	7.1	6.3	12.7	6.9	6.6	4.5	6.6	6.9	(4.3)
Kerosine-Jet	37.2	32.3	15.2	37.2	32.3	15.2	38.9	34.9	11.5	34.4	34.2	0.6
Distillate fuel oil	158.4	140.3	12.9	158.4	140.3	12.9	143.1	154.0	(7.1)	113.6	113.7	(0.1)
Residual fuel oil	54.2	48.5	11.8	54.2	48.5	11.8	47.5	49.7	(4.4)	49.2	49.9	(1.4)
All other oils	170.1	172.6	(1.6)	170.1	172.6	(1.6)	169.8	180.4	(6.4)	176.8	184.4	(4.1)
Total all oils	1,101.7	1,074.5	2.5	1,101.7	1,074.5	2.5	1,074.3	1,124.3	(4.4)	1,095.3	1,073.0	2.1

(a) Preliminary for 1984 data; (b) does not include oil imported for or included in Strategic Petroleum Reserve.

Source: American Petroleum Institute, Monthly Statistical Reports.

PETROLEUM PRODUCTS SUPPLIED (Million Barrels per Day)



Role of Imports in Domestic Demand

Year	U.S. Imports			Domestic Demand for Refined Products			Imports as % of U.S. Demand
	Total (a) (Add 000)	b/d Avg.	% Change	Total (Add 000)	b/d Avg.	% Change	
1984 (b)	1,892,160	5,184	+7.6%	5,733,420	15,708	+3.1%	33.0%
1983	1,758,457	4,818	-5.8	5,559,364	15,231	-0.4	31.6
1982	1,866,358	5,113	-10.9	5,582,938	15,295	-4.7	33.4
1981	2,095,122	5,740	-16.4	5,861,058	16,058	-5.9	35.7
1980	2,512,636	6,865	-18.2	6,242,445	17,056	-7.9	40.3
1979	3,062,053	8,389	+2.3	6,757,077	18,513	-1.8	45.3
1978	2,993,847	8,202	-6.7	6,879,017	18,847	+2.3	43.5
1977	3,207,106	8,787	+20.2	6,727,468	18,431	+5.6	47.7
1976	2,676,411	7,313	+20.8	6,390,750	17,461	+7.2	41.9
1975	2,210,335	6,056	-0.9	5,957,515	16,322	-2.0	37.1
1974	2,230,947	6,112	-2.3	6,078,239	16,653	-3.8	36.7
1973	2,283,493	6,256	+32.0	6,317,303	17,308	+5.7	36.1
1972	1,735,314	4,741	+20.8	5,990,316	16,367	+7.6	29.0
1971	1,432,880	3,926	+14.8	5,552,560	15,212	+3.5	25.8
1970	1,248,062	3,419	+8.0	5,364,473	14,697	+4.0	23.3
1965	900,772	2,468	+9.3	4,202,039	11,512	+4.4	21.4
1960	664,111	1,815	+2.0	3,585,820	9,797	+2.8	18.5
1955	455,564	1,248	+18.6	3,089,348	8,464	+9.0	14.7
1950	310,261	850	+31.8	2,392,974	6,556	+13.0	13.0

(a) Crude oil and products but not crude for Strategic Petroleum Reserve; (b) Preliminary.

Source: American Petroleum Institute, Basic Petroleum Data Book, Petroleum Supply Monthly, Energy Information Administration

Petroleum Product Consumption—1983

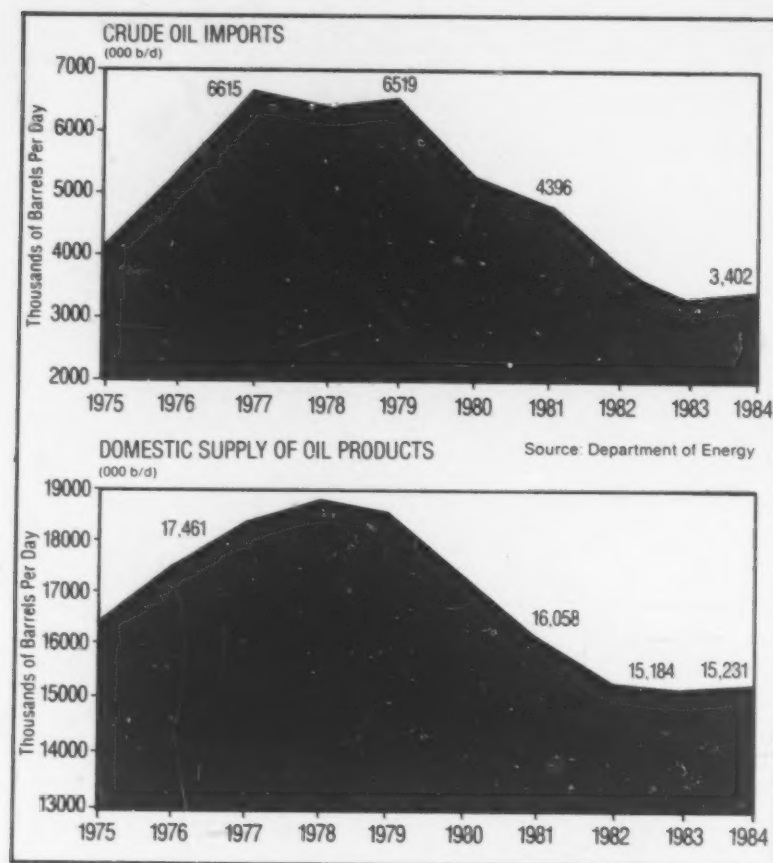
(Add 000 bbl.)

	Motor Gasoline	Aviation Fuels	Middle Distillates ^(a)	Residual Fuel	Asphalt Road Oil	All Other ^(b)	Total
Alabama	34,811	886	18,516	5,118	4,582	20,589	84,502
Alaska	5,109	8,627	8,056	337	424	3,468	26,021
Arizona	30,231	3,244	8,219	88	2,030	11,005	54,817
Arkansas	22,760	359	14,342	1,283	2,257	12,925	53,926
California	253,531	39,087	68,412	58,705	13,700	91,985	525,420
Colorado	33,033	5,015	9,892	13	2,317	10,886	61,156
Connecticut	25,228	793	20,633	22,311	909	13,411	83,285
Delaware	6,310	79	3,128	5,485	256	2,756	18,014
District of Columbia	3,685	90	2,543	1,064	†	1,645	9,007
Florida	106,065	21,446	29,725	54,415	7,055	45,835	264,531
Georgia	61,779	12,558	19,679	4,307	6,445	20,660	125,428
Hawaii	7,307	5,744	4,762	12,228	319	7,667	38,027
Idaho	9,808	281	4,448	202	816	3,015	18,570
Illinois	89,339	13,042	31,388	11,793	6,613	63,518	215,693
Indiana	52,060	3,245	28,519	4,231	7,131	24,456	119,642
Iowa	28,310	495	16,335	291	1,976	22,414	69,821
Kansas	28,501	825	13,528	760	1,787	17,642	63,041
Kentucky	36,784	3,121	18,307	1,030	2,590	18,911	80,723
Louisiana	47,579	7,682	38,632	38,254	3,225	107,084	242,456
Maine	12,228	376	9,281	12,670	721	7,423	42,699
Maryland	41,495	2,156	17,151	9,535	5,346	13,386	89,069
Massachusetts	45,057	5,990	32,006	34,810	1,394	35,073	154,330
Michigan	80,843	3,683	23,314	3,192	3,375	29,252	143,659
Minnesota	34,765	3,348	20,621	1,594	5,815	23,139	89,282
Mississippi	24,118	1,613	12,840	4,326	2,100	11,488	56,485
Missouri	50,110	4,534	20,961	818	4,214	25,547	106,184
Montana	9,036	541	5,949	1,512	1,393	3,030	21,461
Nebraska	17,106	643	8,993	170	824	8,956	36,692
Nevada	9,201	4,023	3,597	39	926	2,563	20,349
New Hampshire	4,481	60	5,163	3,568	482	4,592	18,346
New Jersey	92,459	30,051	46,091	28,095	7,533	40,370	244,629
New Mexico	13,181	774	9,236	529	2,187	35,561	61,468
New York	93,263	2,223	62,644	79,354	7,065	81,894	326,443
North Carolina	53,310	3,605	23,010	4,372	3,964	27,930	116,191
North Dakota	6,277	179	7,041	954	1,343	4,332	20,126
Ohio	98,778	4,609	41,361	2,090	8,313	64,416	219,585
Oklahoma	39,249	3,101	14,615	603	5,339	19,928	82,835
Oregon	28,391	1,479	15,070	7,726	2,679	8,483	63,828
Pennsylvania	108,752	7,471	55,394	24,008	4,911	32,090	232,626
Rhode Island	9,522	264	3,982	1,203	1,494	5,217	21,682
South Carolina	29,723	488	10,325	2,255	2,344	12,350	57,485
South Dakota	8,143	213	4,999	44	658	4,269	18,346
Tennessee	49,365	1,614	20,178	647	3,697	19,012	94,513
Texas	225,138	34,913	103,384	50,898	14,446	235,964	665,243
Utah	13,121	2,026	6,885	802	1,011	7,843	31,688
Vermont	2,368	49	3,137	271	78	3,880	9,783
Virginia	55,672	7,115	22,757	7,328	3,479	17,958	114,309
Washington	43,805	9,189	18,306	8,791	2,847	17,602	100,520
West Virginia	13,933	217	7,938	1,050	503	10,491	34,132
Wisconsin	33,883	1,442	20,484	1,954	2,515	24,221	84,499
Wyoming	7,000	152	11,962	1,481	498	5,694	26,797
TOTAL	2,235,981	264,740	1,028,279	518,604	167,916	1,343,844	5,559,364

^(a)Includes kerosene.^(b)Includes LPG, naphtha, lubricants, waxes, petroleum coke and still gas.

†Included with Maryland data.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1984."



Unleaded Gasoline: The Growth by Years (Add 000 b/d)

	Total Gasoline Consumption	Unleaded Gasoline Consumption	Unleaded Percent of total
1973 Ave.	6,674	NA	NA
1974 Ave.	6,537	NA	NA
1975 Ave.	6,675	NA	NA
1976 Ave.	6,978	NA	NA
1977 Ave.(a)	7,177	1,976	27.5
1978 Ave.	7,412	2,521	34.0
1979 Ave.	7,034	2,798	39.8
1980 Ave.	6,579	3,067	46.6
1981 Ave.	6,588	3,264	49.5
1982 Ave.	6,539	3,409	52.1
1983 Ave.	6,622	3,647	55.1
1984 January	6,268	3,606	57.5
February	6,237	3,585	57.5
March	6,512	3,747	57.5
April	6,682	3,854	57.7
May	6,873	3,990	58.1
June	7,092	4,210	59.4
July	6,849	4,094	59.8
August	7,114	4,263	59.9
September	6,614	3,982	60.2
October	6,730	4,074	60.5
November	6,805	4,243	62.3
December	6,580	4,185	63.6
Average	6,698	3,987	59.5

(a) Unleaded was mandated in July for all new model cars.
Source: Energy Information Administration, Monthly Energy Review.

Supply and Demand, Principal Products (Add 000 bbl.)

	Motor Gasoline	Aviation Gasoline	Distillate Fuel Oil	Residual Fuel Oil	Jet Fuel (a)	Lubricants	Asphalt
Domestic Supply							
1984 (b)	2,451,329	9,275	1,042,370	499,504	428,170	56,056	144,877
1983	2,417,084	9,444	981,927	518,604	381,783	53,426	136,241
Production							
1984 (b)	2,366,233	9,107	982,502	326,697	414,148	58,364	141,405
1983	2,313,354	8,050	896,504	310,863	373,161	53,808	135,659
Imports							
1984 (b)	106,607	603	96,742	246,617	20,721	3,676	5,048
1983	90,184	214	63,542	255,213	10,744	4,124	135,659

(a) Naphtha and kerosene based fuels; (b) Preliminary data.

U.S. Oil Imports (a) (Add 000 b/d)

Year	Crude Oil	Other Products	Residual Fuel Oil	Total Imports	% of Total U.S. Supply
1984 (b) ...	3,206	1,305	674	5,185	33.8%
1983	3,096	1,023	699	4,818	31.6
1982	3,323	849	776	4,948	32.3

(a) Does not include Strategic Petroleum Reserve; (b) Preliminary.
Source: Department of Energy, Monthly Energy Review and IPAA.

Origins of U.S. Oil Imports

	OPEC Sources		Arab OPEC		Hemispheres	
	Thous. b/d	% of total imports	Thous. b/d	% of total imports	Western Thous.	Eastern b/d
1984	2,043	37.7	806	14.9	2,792	2,633
1983	1,832	36.9	625	12.5	2,702	2,349
1982	2,146	42.0	854	16.7	2,423	2,690

Source: Independent Petroleum Assn. of America, preliminary report.

Year	Total Well Completions			Proved Reserves				Supply (Add 000 b/d)	
	Total (a)	Dry	% Dry	Crude Oil (b)	Crude Production/Reserve Ratio	Natural Gas (c)	Natural Gas Production/Reserve Ratio	Domestic Crude & Natl. Gas Lqds.	Crude & Product imports
1984 (d) ...	84,135	25,222	30.0	NA	NA	NA	NA	10,390	5,381
1983	78,542	23,494	29.9	27,735	9.2	200.3	12.7	10,247	5,051
1982	88,106	26,549	30.1	27,858	9.4	201.5	11.5	10,199	5,113

(a) Includes oil, gas, service and dry completions; (b) Millions of bbl.; (c) Trillions of cubic feet; (d) Preliminary.
Source: Independent Petroleum Assn. of America and Energy Information Administration.

SOURCE OF POWER

Dayco . . . First Choice for Hose Quality and Integrity. Why settle for second best?

In the development and manufacture of critical application hose for aircraft refueling, chemical transfer, fuel transfer and curb pump use, Dayco actually sets the standards . . . the toughest in the marketplace.

100% tested. To assure consistent quality and performance, Dayco pump hose is 100% pressure and static continuity tested. Other tests, including coupling pull-off, go well beyond UL standards.

#1 hose supplier. This dedication to excellence has led an overwhelming majority of the nation's pump manufacturers to equip their pumps with Dayco hose.

New "semi-hardwall" hose. Dayco's curb pump line, the industry's broadest, now

has something new! Super-Flex II, a unique semi-hardwall hose that combines the toughness and durability of hardwall with the resiliency of soft-



wall. This hose is tough enough to take the abuse and punishment of self-service use. Eliminates meter creep, too. The flexible nylon helix prevents kinking and enables Super-Flex II to bounce back to its original shape even after severe twisting or crushing. You get best-of-both-worlds performance at a very competitive price.

If you use curb pump, tank truck or any critical application hose, why settle for second best? Dayco hose is built and fully tested for longer life, consistently higher performance. For more information, check with your Dayco Distributor, the Source of Power in your area. A most dependable, knowledgeable and competitive source for hose. Or contact: Dayco Corporation, Rubber Products Company, 333 West First Street, Dayton, Ohio 45402. 513/226-5923.

DAYCO

IPAA '85 Forecast: Looks Like '84 All Over

(1000 bbl except closing stocks)

DEMAND

Domestic Product Demand:

	1st Q	2nd Q	3rd Q	4th Q	Est. '85	Est. '84	% Chng.
Motor Gasoline	6,407	6,037	6,018	6,722	6,722	5,723	—
Aviation Fuels	1,165	1,168	1,163	1,176	1,177	1,165	1.0
Middle Distillates	3,321	2,916	2,746	3,163	3,040	3,007	1.1
Residual Fuel Oil	1,683	1,295	1,288	1,370	1,400	1,421	(1.5)
Liquefied Gases	1,765	1,386	1,417	1,719	1,571	1,570	—
Other Products	1,747	2,040	2,281	1,910	1,980	1,945	2.3
Total	16,058	15,842	15,826	18,080	15,900	15,831	0.4
Exports	680	718	675	680	686	684	(0.9)
TOTAL DEMAND	16,738	16,560	16,501	18,760	16,586	16,525	0.4

SUPPLY

Domestic Production:

Crude Oil	8,820	8,800	8,800	8,780	8,800	8,800	—
Nat'l Gas Liquids	1,588	1,588	1,575	1,585	1,587	1,605	(1.1)
Total	10,408	10,388	10,375	10,375	10,387	10,405	(0.2)

Imports:

Crude Oil	3,335	3,633	3,662	3,632	3,617	3,360	7.6
Motor Gasoline	281	297	289	280	267	321	(10.6)
Aviation Fuels	59	65	54	50	57	57	—
Middle Distillates	240	238	268	267	253	268	(5.6)
Residual Fuel Oil	883	633	642	707	716	725	(1.2)
Liquefied Gases	251	189	195	241	219	209	4.8
Other Products	346	416	386	375	382	378	1.1
Total Imports	5,377	5,471	5,716	5,552	5,531	5,318	4.0
Other Supply	535	697	665	667	644	645	(23.9)
TOTAL SUPPLY	16,320	16,557	16,756	16,614	16,562	16,589	—

INVENTORIES

Closing Stocks (000,000 bbl.):

Motor Gasoline	239.3	232.9	222.3	225.3	225.3	229.5	(1.6)
Aviation Fuels	45.0	45.6	44.7	43.3	43.3	42.8	(1.2)
Middle Distillates	121.4	123.8	157.2	155.3	155.3	159.6	(2.7)
Residual Fuel Oil	45.0	45.9	46.0	46.0	46.0	47.9	(4.0)
Liquefied Gases	88.0	105.2	116.8	104.8	104.8	105.0	(0.2)
Other Products	52.1	50.6	43.5	45.9	45.9	43.9	4.6
Total Products	590.8	604.0	630.5	620.6	620.6	626.7	(1.3)
Unfinished Oil	112.5	109.5	109.7	107.6	107.6	107.5	(0.3)
Nat'l Gas Liquids	10.8	11.8	11.8	11.6	11.6	11.5	(0.9)
Crude Oil	336.3	345.2	341.9	340.5	340.5	342.3	(0.5)
TOTAL INVENTORIES	1,086.4	1,070.3	1,093.9	1,080.5	1,080.5	1,090.0	(0.9)

Source: Independent Petroleum Assn. of America, Supply and Demand Committee, November 19, 1984.

The Independent Petroleum Assn. of America, which has a pretty good track record for its forecasts, feels that 1985 will turn out pretty much like 1984 all over again.

Domestic product demand is expected to average around 15.9-million b/d in 1985, up only slightly over 1984. Continued conservation and a return to normal weather were expected to offset whatever gains might normally have come from the economy.

Motor gasoline demand in 1985 will probably remain flat compared to 1984, IPAA says. Fleet efficiency improvements will counter the increase in the number of miles that will be driven this year.

Middle distillate demand is estimated to rise only 1% to just over 3-million b/d. This bulk of this increase, however, is coming from transportation needs, not space-heating.

Residual fuel oil demand is expected to

decline 1.5%, which should surprise no one.

Supply will be about the same as it was in 1984, IPAA says. Crude imports could rise to 260,000 b/d while product imports should drop by 50,000 b/d.

IPAA makes two forecasts per year, one in the fall and the other in the spring. The 1985 spring meeting was pushed back to the end of May this year, however, meaning that its spring update would be too late for the 1985 Factbook.

Ferranti. 100 years of innovation experience.



**Trading up to electronic pumps doesn't have to mean
trading in your console.**

Ferranti's new Autofil electronic fuel pump makes the most of your investment in current equipment. Autofil dispensers can work with your present mechanical console. Or you can use the sophisticated Autofil electronic console.

For flexibility, for value, it's Ferranti. Contact Ferranti Indiana, Inc., 4211 Engle Road, Post Office Box 9697, Fort Wayne, Indiana 46839. Telephone: 219/452-4214.

FERRANTI

U.S. Supply/Demand Projections—1984-2000

Conoco Inc.'s fifth annual long range forecast confirms anew that U.S. oil demand will continue to rise in the years ahead—but at a snail's pace, about one-half of one percent per year from 1984 through 2000.

Conoco says the slow growth will be largely attributable to continued declines in the consumption of gasoline, which accounts for about two-fifths of the U.S. oil demand.

The company's "World Energy Outlook Through 2000" anticipates that U.S. oil demand, which peaked at 19-million b/d in 1978 and fell to 15-million b/d in 1983, would rise to 16.5-million b/d in 1990 and 17-million b/d by the year 2000. The upward movement began in 1984.

Here are some other highlights of the Conoco projections:

- The average fuel efficiency of new autos is not expected to increase through 1990 because buyers are opting for larger, more powerful cars. Nevertheless, the average fuel efficiency of the total auto fleet will improve slowly as older, less-efficient cars are scrapped.

- Kerosene jet fuel demand will rise as increased air travel is only partially offset by improvements in aircraft fuel efficiency and load factors.

- Distillate consumption will grow slowly as freight transportation fuel use expands and other uses, including home heating, contract.

- Residual fuel oil consumption will expand slowly due to increased bunkering of maritime vessels and rising use for power generation.

Conoco says domestic supplies of crude oil will continue to decrease through the years ahead as the older and larger U.S. fields begin to give out. The decline will average 1% annually while imports rise from 4.5-million b/d in 1984 to 7.5-million b/d in 2000.

The outlook adds:

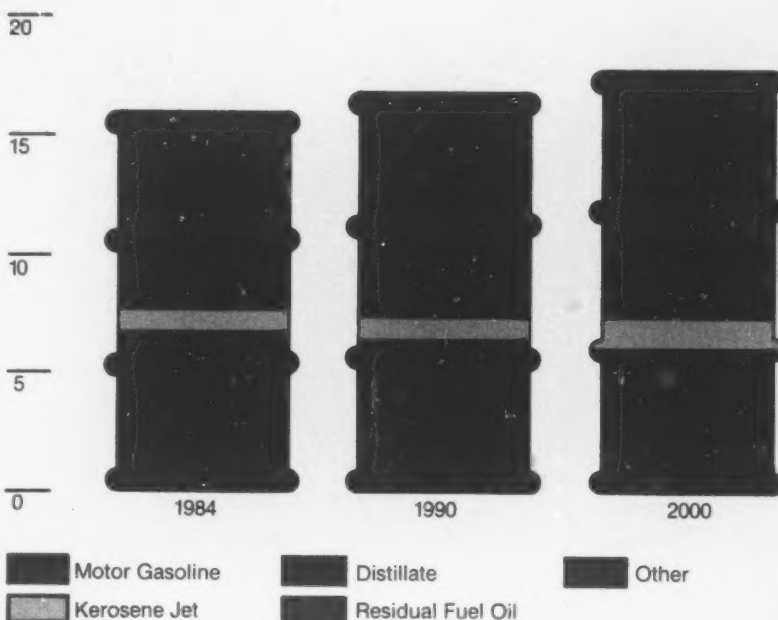
Even Alaskan production will decline in the 1990s as new developments fail to offset falling output from Prudhoe Bay. Increased production off the California coast, one of the hottest domestic exploration plays currently, will not be sufficient to offset the decrease in other Lower-48 crude production.

Synthetic liquids from coal and shale oil are not commercially viable given the crude price outlook, so they will contribute less than 100,000 b/d by 2000.

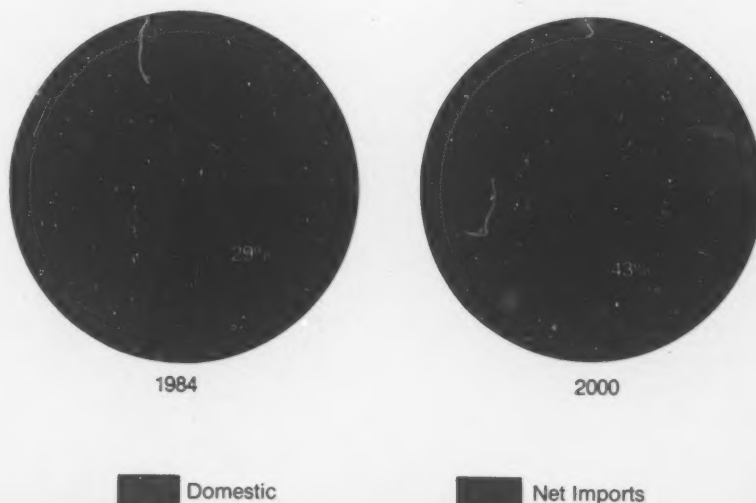
The end result of all this will be an increase in U.S. reliance on net imports from 29% of oil demand in 1984 to 43% in 2000. By the turn of the century, import dependence will have returned to the level that existed prior to the price shock induced by the Iranian Revolution.

U.S. Oil Demand

(Million Barrels Per Day)



Sources of U.S. Oil Supply



All-Time Total, Wells Drilled in U.S. (a)

	OIL		GAS		DRY		TOTAL
	Number	Percent	Number	Percent	Number	Percent	Number
PAD District 1							
Florida	255	27.9	4	0.4	656	71.7	915
Maryland	0	0	72	60.5	47	39.5	119
New York	9,051	66.7	3,503	22.7	1,007	7.4	13,565
Pennsylvania	247,306	79.2	26,555	8.5	38,435	12.3	312,337
Virginia	56	10.4	357	63.9	127	23.5	540
West Virginia	47,154	43.2	42,512	38.9	19,499	17.7	109,165
Total	303,822	69.6	73,007	16.7	59,771	13.7	436,641
PAD District 2							
Illinois	74,604	60.9	1,431	1.2	46,392	37.9	122,427
Indiana	37,268	59.2	2,097	3.3	23,604	37.5	62,969
Kansas	112,827	52.0	21,224	9.7	84,636	38.2	218,677
Kentucky	48,751	52.0	10,071	10.7	34,905	37.2	93,727
Michigan	13,342	39.9	2,613	7.8	17,512	52.3	33,467
Missouri	685	36.3	195	10.3	1,009	53.4	1,889
Nebraska	4,988	30.6	206	1.3	11,117	68.2	16,312
North Dakota	4,725	50.4	93	1.0	4,559	48.8	9,377
Ohio	69,905	45.8	46,436	30.5	36,143	23.7	152,484
Oklahoma	220,041	60.1	40,731	11.1	105,363	28.8	366,158
South Dakota	176	17.0	68	6.6	788	76.4	1,032
Tennessee	1,431	27.3	1,280	24.4	2,538	48.4	5,249
Total	588,743	54.3	126,445	11.7	368,566	34.0	1,083,768
PAD District 3							
Alabama	847	23.7	579	15.2	2,145	61.5	3,571
Arkansas	16,887	53.9	2,767	8.8	11,892	37.3	31,346
Louisiana	76,132	45.8	27,847	16.8	62,175	37.4	166,154
Mississippi	7,069	32.3	1,191	5.5	13,449	62.0	21,709
New Mexico	27,695	49.4	16,857	30.0	11,911	21.2	56,097
Texas	458,118	58.6	67,114	8.6	256,205	32.8	781,439
Total	586,748	55.3	116,357	10.9	357,618	33.7	1,060,316
PAD District 4							
Colorado	9,150	27.0	5,814	17.2	18,867	55.8	33,831
Montana	9,929	37.1	4,010	15.0	13,059	48.7	26,998
Utah	2,828	38.5	1,179	16.0	3,340	45.5	7,347
Wyoming	24,219	51.7	3,397	7.2	19,243	41.1	46,859
Total	46,126	40.1	14,400	12.5	54,509	47.4	115,035
PAD District 5							
Alaska	1,226	68.0	116	6.4	462	25.6	1,804
Arizona	53	11.2	35	7.4	384	81.4	472
California	100,233	77.7	3,015	2.3	25,745	20.0	128,993
Nevada	35	12.0	1	0.3	255	87.6	291
Oregon	0	0	11	3.8	201	96.2	292
Total	101,547	77.0	3,178	2.4	27,127	20.6	131,852
Atlantic Coast	0	0	0	0	30	100.0	30
Gulf of Mexico Northern	58	21.7	13	4.9	196	73.4	267
Pacific Coast	0	0	0	0	4	100.0	4
Total Federal Waters	58	19.2	13	4.3	230	76.4	301
Miscellaneous	3	0.5	0	0	554	99.5	557
TOTAL	1,627,047	57.5	333,400	11.8	868,375	30.7	2,828,470

(a) To Jan. 1, 1984; totals exclude service wells.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State-1984."

Gasoline is Oil's Prime Product

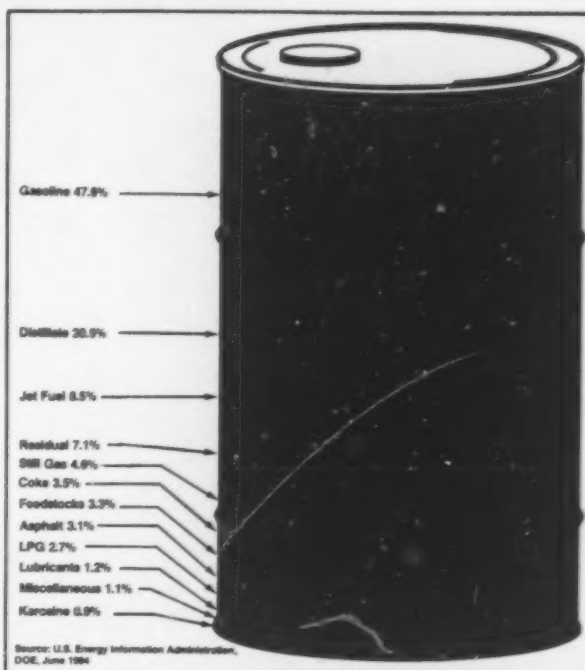
Distilled in hundreds of refineries, crude oil produces a variety of products, and gasoline is by far the most important. On the average, gasoline accounts for 47.6% of the crude oil barrel. Some sophisticated refineries, however, can easily exceed that average and produce even greater volumes of gasoline.

Here are the average yields for a standard 42-gal. bbl.:

Product	Gallons	Product	Gallons
Gasoline	19.9	Feedstocks	1.4
Distillate	8.6	Asphalt	1.3
Jet Fuel	3.6	LP-Gas	1.1
Residual	3.0	Lubricants	0.5
Still Gas	1.9	Kerosine	0.4
Coke	1.5	Miscellaneous	0.2

(These yields total 43.7 gal. mostly as a result of hydrogen processing gains. Similarly, in the chart at the right, the percentages include 4.1% processing gains.)

Legend has it that the 42-gal. bbl. dates back to the 15th century when King Edward IV of Norway standardized the herring barrel at 42 gal. Subsequently this became a standard for whiskey barrels in the U.S. The oil barrel was modeled after that in 1866 for all U.S. shipments. Canada uses an imperial gallon, which is larger than the U.S. variety, while most countries overseas use the metric system for weights and measures.



To understand much of what we're doing with respect to cancer research, you'd need a graduate degree in microbiology or biochemistry.

But to understand how well our educational programs and service resources help both patients and their families, simply talk to one out of every 100 Americans who are part of our volunteer program. Or talk to one of the 3 million who've survived cancer.

The battle isn't over but we are winning.

Please support the American Cancer Society.





PAD Districts

PAD 1: Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, and West Virginia;
PAD 2: Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma,

South Dakota, Tennessee, and Wisconsin; **PAD 3:** Alabama, Arkansas, Louisiana, Mississippi, New Mexico, and Texas; **PAD 4:** Colorado, Idaho, Montana, Utah, and Wyoming; **PAD 5:** Alaska, Arizona, California, Hawaii, Nevada, Oregon, and Washington.

Source: Energy Data Reports, Department of Energy.

BUREAU OF MINES REFINING DISTRICTS



The "PROTECTORS" from HUSKY

Low cost insurance against dangerous, costly accidents

Protect yourself with **Safe-T-Break™**



Stops fuel flow if customer pulls away with nozzle still in tank . . . !

Safe-T-Break™ protects against

- Dangerous runaway fuel spillage
- Costly dispenser damage
- Expensive down time

Works easy as 1 - 2 - 3!

1. This fitting attaches to the existing fuel hose and breaks away when pull reaches 150 pound pressure.



Patent Pending

2. At moment of breakaway, butterfly check valves in these fittings immediately close, preventing runaway fuel spillage. (When open, they offer no resistance to fuel flow).
3. This fitting remains securely attached to either the dispenser or the nozzle swivel.

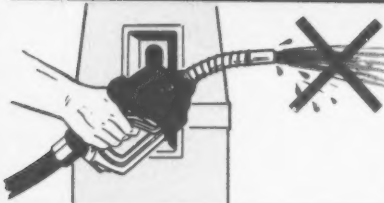
Completely self-contained . . . Easy to install . . .
Safe-T-Break comes completely assembled . . . just attach it either between the fuel hose and the dispenser or between the fuel hose and the nozzle. Standard fittings make installation easy.

Protect yourself with **FLO-STOP**

Stops fuel flow if nozzle falls from tank . . . !



Stops fuel flow if customer squeezes lever when lifting nozzle out of pump boot . . . !



This simple safety device, built right in the spout tip, holds back fuel flow until nozzle is pointed down in dispensing position. Now included on all "Leader" nozzles at NO EXTRA COST!



MIGHTY-PUP SWIVELS

Safety-proven in the field for over 4 years!

- Most dependable • Best performing • Best liked



HUSKY CORPORATION 1+ Dailey Industrial Park • P.O. Box 67 • Pacific, Mo. 63069
Phone: 1-314-257-3073 • Cable: Husky Corp.
2104 N. Forbes Blvd. #101 • Broadbent Interstate Center
Tucson, Arizona 85745 • Phone: 1-602-882-4191



Primary Storage Capacity: No Need for Concern

The industry has more than enough primary storage capacity to take care of its needs and, in fact, has enough in reserve that it can expand to record-breaking proportions in a hurry if it has to. The most recent study by National Petroleum Council, completed in late 1983, shows that the total capacity actually shrank a little between 1978 and 1983 in the face of the declining consump-

tion in the marketplaces. The same study indicated that the industry's minimum operating inventories also dropped noticeably over that same four-year period. Two-thirds of the decreases involved storage capacities for distillate and residual fuel oils.

The following tables give a thumbnail picture of the primary capacity system for crude and products:

Primary Storage Capacity—1978 and 1983

(millions of bbl.)

	3/31/78		3/31/83		
	Tankage In Operation	Under Construction	Tankage In Operation	Under Construction	Idle But Available
Crude oil	462	12	499	10	16*
Gasoline	464	5	456	3	7
Kerosine	86	1	21	1	1
Kero-Jet Fuel			68	—	3
Distillate	336	3	295	1	18*
Residual	156	1	143	4	13*
Total	1,504	22	1,482	19	58

*Includes some that requires environmental waivers to restore to operation.

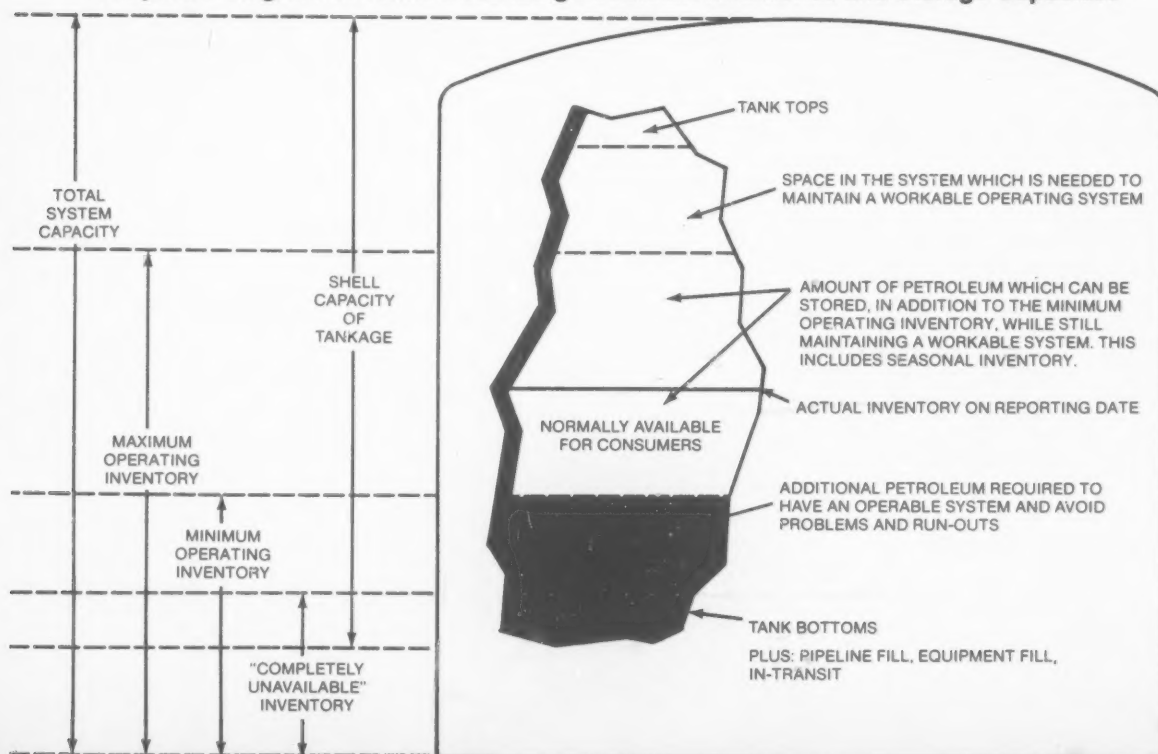
Primary Minimum Operating Inventories—1979 and 1983

(millions of bbl.)

	1979 Total U.S.	1983		Total U.S.	U.S. Decrease '83 vs '79
		PADs 1-4	PAD 5		
Crude oil	290	215	70	285	5
Gasoline	210	176	24	200	10
Kerosine	35	5	—	5	-5
Kero-Jet Fuel		20	5	25	
Distillate	125	97	8	105	20
Residual	60	34	6	40	20
Total	720	547	113	660	60

Source: (both tables) National Petroleum Council, Petroleum Inventories and Storage Capacity, November 1983.

Simplified Diagram of Terms Describing Petroleum Inventories and Storage Capacities



Estimated Storage Capacity and Inventory in the U.S. Petroleum Distribution System

(as of March 31, 1983)

(gal. for product, bbl. for crude oil; add 000,000 in both cases)

	Primary			Secondary			Tertiary			Total U.S.		
	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized
Gasoline.....	19,152	9,366	48.9%	4,242	1,470	34.7%	4,326	1,764	40.8%	27,720	12,642	45.6%
Kerosine.....	882	378	42.9	168	42	25.0	(a)	(a)	—	1,050	420	40.0
Kero-Jet fuel.....	2,856	1,470	51.5	—	—	—	882	462	52.4	3,738	1,932	51.7
Distillate.....	12,390	4,956	40.0	1,754	420	23.8	11,844	5,502	46.5	25,998	10,878	41.8
Residual.....	6,006	1,932	32.2	252	84	33.3	9,954	3,612	36.3	16,212	5,628	34.7
Total (b).....	41,286	18,102	43.8	6,426	2,016	31.4	27,006	11,340	41.9	74,718	31,440	42.0
Crude oil (c).....	499	313	62.7	—	—	—	—	—	—	499	313	62.7

(a) Included in distillate for tertiary storage segment; (b) Totals include surveyed products only. These inventory levels and utilization of storage represent satisfactory levels under normal operating conditions, according to the National Petroleum Council. Also, totals may not add up, due to independent rounding; (c) Excludes 31-million bbl. of Alaskan North Slope crude oil in transit.

Source: National Petroleum Council, Study of Petroleum Inventories and Storage Capacity, June 1984.

Secondary and Tertiary Storage Capacity

National Petroleum Council, at the request of the federal government, put together a series of calculations on the secondary and tertiary storage capacities of the domestic petroleum industry for the first time. These were published in the summer of 1984. It was the first time that petroleum has had more than rough estimates of its storage capabilities.

The Council defined the secondary distribution system as: **Bulk Plants**—storage facilities that have a total storage capacity of less than 50,000 bbl. and do not receive petroleum products by barge, ship or pipeline; **Retail Motor Fuel Outlets**—service stations, truck stops, etc. It defined **Tertiary Storage Capacity** as the end users—the utilities, agricultural, commercial, residential, transportation, etc.

Here are its findings:

Estimated Storage Capacity and Inventory in the Secondary Distribution System on 3/31/1983

	(millions of gal.)	
	Storage Capacity	Inventory
Motor gasoline	4,242	1,470
Kerosine	168	42
Diesel/distillate fuel oil	1,764	420
Residual fuel oil	252	84
Total*	6,426	2,016

*Totals include survey products only.

NPC, for the purposes of this study, estimated there were approximately 18,000 companies owning or operating bulk plants in the U.S. on March 31, 1983. It cited these specifics:

Estimated Storage Capacity and Inventory at Bulk Plants as of 3/31/83

	(millions of gal.)	
	Storage Capacity	Inventory
Motor Gasoline	924	378
Kerosine	168	42
Diesel/distillate fuel oil	1,554	336
Residual Fuel oil	252	84
Total*	2,898	840

*Totals include products surveyed only.

Data from several sources was analyzed to determine the number of retail motor fuel outlets as well as their storage capacity and inventories. It was determined that as of March 31, 1983, there were approximately 210,000 retail outlets in the U.S. with an estimated storage capacity of 16,800 gal. and an average inventory of 5,600 gal. The total storage capacity at retail outlets, as of March 31, 1983, was estimated to have been 3,528,000,000 gal., with inventories about 1,176,000,000 gal. This is the break-out:

Estimated Storage Capacity and Inventory at Motor Fuel Outlets as of 3/31/83

	(millions of gal.)	
	Storage Capacity	Inventory
Motor Gasoline	3,318	1,092
Diesel/distillate fuel oil	210	84
Total*	3,528	1,176

*Totals include surveyed products only.

For purposes of the NPC study, the tertiary storage segment was divided into seven sectors, as follows:

Estimated Storage Capacity and Inventory in the Tertiary Storage Segment as of 3/31/83

	(millions of gal.)	
	Storage Capacity	Inventory
By Sector		
Agricultural	1,722	588
Commercial	1,554	336
Electric utilities	8,946	3,822
Industrial	2,562	714
Military/Government	2,352	966
Residential	4,200	2,310
Transportation	5,628	2,562
Total of Sectors*	26,964	11,298
By Product		
Motor Gasoline	4,326	1,764
Kerosine, diesel and distillates	11,844	5,502
Kero-Jet fuel	882	462
Residual fuel oil	9,954	3,612
Totals*	27,006	11,340

*Totals included surveyed products only; totals may not add due to independent rounding.

LET THE POLLULERT DETECTION SYSTEM CHECK THE WATER AND THE OIL.

You're too busy to spend time worrying about leaks underneath your service stations. So let the Mallory FD162 Pollulert® Fluid Detection System do it for you.

The Pollulert system works day and night to detect underground tank leaks and ground spills. It monitors the presence of petroleum, water, and air, and alerts you the instant there's a problem.

But you won't constantly be pestered by false alarms. Pollulert is specially designed to tell the difference between a normal presence and when a leak occurs.

You can monitor multiple locations at each site with Pollulert — the system can be equipped with up to 10 individual probes.

To find out more about the "leak insurance" you need, write us. We'll send you the free booklet, Fluid Leak Detection: The Only Solution. Fill out the coupon and drop it in the mail immediately. Or call (317) 856-3857.

Name _____

Title _____

Company _____

Address _____

City _____

State _____ Zip _____

Telephone _____

Mail to: POLLULERT Systems
Mallory Components Group
P.O. Box 704
Indianapolis, IN 46206-0704

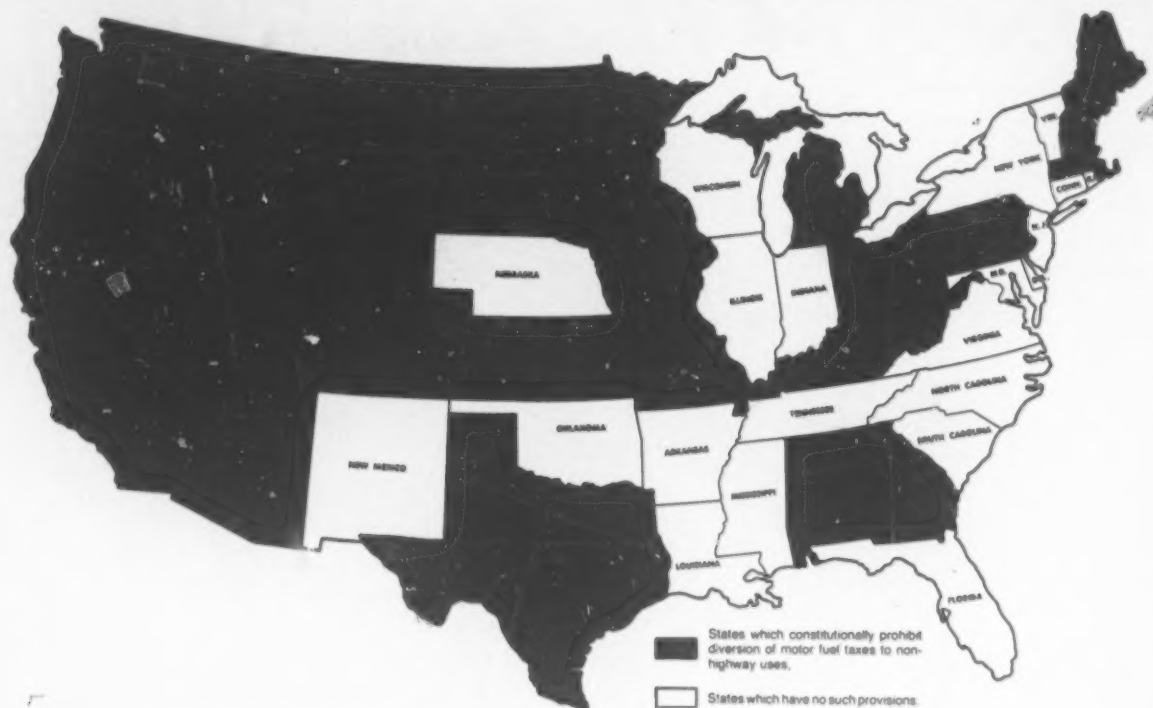


POLLULERT

MALLORY

ELECTRICAL ELECTRONIC GROUP

EMHART



State Tax Collections

State	Gasoline tax rates per gal. in 1984	Total state motor fuel tax revenues (Add 000)		% Change
		1984	1983	
Alabama.....	13c	\$265,537	\$251,031	5.8%
Alaska.....	8	27,574	24,280	13.6
Arizona.....	13	261,699	169,722	54.2
Arkansas.....	9.5	140,899	128,501	9.6
California.....	9	1,152,597	1,115,850	3.3
Colorado.....	12	199,720	167,453	19.3
Connecticut.....	15	205,403	193,182	6.3
Delaware.....	11	28,055	36,380	4.6
Dist. of Columbia.....	15.5*	26,808	24,277	10.4
Florida.....	9.7*	588,591	494,671	19.0
Georgia.....	7.5	282,907	259,952	9.1
Hawaii.....	8.5	29,608	27,435	7.9
Idaho.....	14.5	74,233	69,496	6.8
Illinois.....	12	566,679	433,037	30.9
Indiana.....	11.1*	352,278	331,124	6.4
Iowa.....	13	210,313	184,689	13.8
Kansas.....	11	147,257	122,893	19.8
Kentucky.....	10*	203,321	195,251	3.6
Louisiana.....	16	308,272	195,312	57.0
Maine.....	14	91,357	71,699	27.4
Maryland.....	13.5*	306,429	267,982	14.3
Massachusetts.....	11*	281,223	264,628	6.3
Michigan.....	15*	617,402	488,770	26.3
Minnesota.....	17	391,317	303,221	29.1
Mississippi.....	9	143,710	126,584	13.1
Missouri.....	7	206,503	195,305	5.7
Montana.....	15	91,253	61,083	49.4
Nebraska.....	14.7*	144,277	116,120	24.2
Nevada.....	12	70,620	66,331	6.5
New Hampshire.....	14	70,211	61,951	13.3
New Jersey.....	8	310,077	298,798	3.8
New Mexico.....	11*	102,128	83,116	9.7
New York.....	8	434,430	422,386	2.9
North Carolina.....	12.25	433,385	390,378	11.0
North Dakota.....	13	56,168	43,229	29.9
Ohio.....	12*	651,231	595,200	9.4
Oklahoma.....	9	201,316	132,220	52.2
Oregon.....	9	116,698	97,814	19.3
Pennsylvania.....	12	913,214	746,307	22.4
Rhode Island.....	13*	54,599	46,509	17.3
South Carolina.....	13	248,874	232,575	7.0
South Dakota.....	13	56,351	52,162	8.0
Tennessee.....	10	294,910	278,418	5.9
Texas.....	10	779,637	503,443	54.9
Utah.....	14	167,834	81,559	32.2

State	Gasoline tax rates per gal. in 1984	Total state motor fuel tax revenues (Add 000)		% Change
		1984	1983	
Vermont.....	13	38,260	36,480	7.6
Virginia.....	13.63*	440,276	399,287	10.3
Washington.....	18	359,276	285,610	26.0
West Virginia.....	15.35*	99,073	99,709	(0.2)
Wisconsin.....	16	356,263	307,494	17.1
Wyoming.....	8	40,110	34,973	14.7
Total		\$13,590,056	\$11,627,177	16.9%

Note: Gasoline taxes are for gasoline only. *Variable tax expressed in average ¢ per gal. Total revenues include other receipts; 1984 data are estimates.

Source: Federal Highway Administration, Table SS83-2, October 1984.

Federal (Add 000)

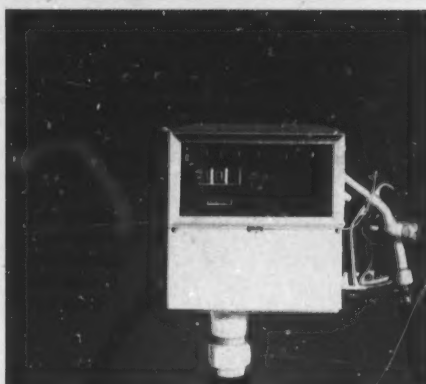
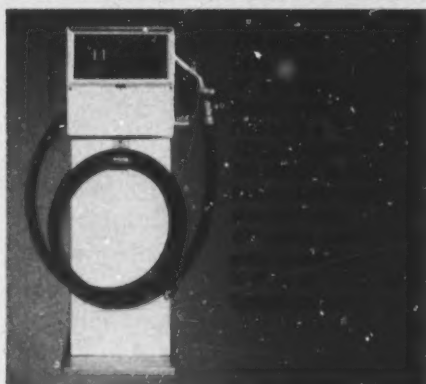
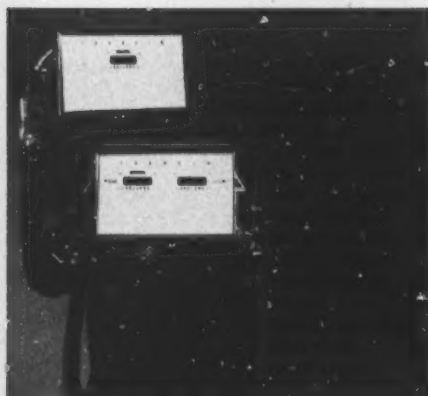
Year	Gasoline(a)	Diesel and special fuels(a)	Lube oil(b)	Total
1984(c).....	\$8,774,821	\$1,630,228	(\$10,156)	\$10,394,893
1983.....	6,091,841	957,988	8,847	7,058,676
1982.....	4,120,013	594,083	76,181	4,790,277
1981.....	3,801,795	570,477	74,695	4,446,967
1980.....	4,019,481	518,352	78,835	4,616,668
1979.....	4,282,919	508,595	82,335	4,873,849
1978.....	4,381,950	488,064	79,047	4,949,061
1977.....	4,229,721	452,631	78,830	4,761,182
1976.....	4,140,924	408,560	70,135	4,619,619
1975.....	3,884,483	362,675	66,124	4,313,282
1974.....	3,854,505	373,302	78,155	4,305,962
1973.....	3,958,682	358,120	86,266	4,403,068
1972.....	3,736,545	321,551	85,841	4,143,937
1971.....	3,513,927	275,159	67,130	3,856,216
1970.....	3,408,505	264,815	65,862	3,739,182

(a) Taxes went up from 4¢ gal. to 9¢ gal. on April 1, 1984. Totals exclude mass transit account taxes which went into effect April 1, 1983. Mass transit account taxes amounted to \$519.6-million in 1983, and \$1.2-billion in 1984.

(b) Lube oil tax of 4¢ gal. was discontinued in 1983 and 1984 deficit represents paybacks. (c) Figures for 1984 are fiscal year gross collections that went to the Highway Trust Fund, since net IRS calendar year information was not available. All other figures represent calendar year net collections after refunds and include the taxes the federal government pays on its own purchases.

Source: U.S. Department of Transportation, Federal Highway Administration.

Smooth-Flo^{T.M.} FAST, DEPENDABLE FUEL & LIQUID TRANSFER PUMPS FOR HEAVY, MEDIUM & LIGHT-DUTY USE



Built with Tokheim dependability and well-known quality, a **Smooth-Flo** electric transfer pump is the choice to make for long-lasting, reliable service.

The versatile **Smooth-Flo** line of compact and stationary models covers a wide variety of applications—from large-volume fleet refueling

to farm and construction site use, to drum and tank transfers—with a complete line of optional accessories.

Delivery rates range from 10 to 60 GPM. All units are UL-listed.

Smooth-Flo pumps are backed by the Tokheim reputation for excellent quality, and by a nationwide

Sales & Service network. Contact your Tokheim distributor, listed in the Yellow Pages, for the **Smooth-Flo** pump your application requires.



Systems for the Movement and Measurement of Liquids.

TOKHEIM CORPORATION

COMMERCIAL PRODUCTS

Dept. A-1

FORT WAYNE, IN 46801

*Flow rates stated are subject to conditions of installation and accessories used. See your Tokheim representative for details.

Outlook for Tires and Batteries at Stations

Year	Replacement passenger tire shipments			Replacement automotive-type battery shipments		
	Total (in millions)	Station sales (a) (in millions)	Average per station (a)	Total (in millions)	Station sales (a) (in millions)	Average per station (a)
1984	145	29.0	220	59.3	17.8	135
1983	134	26.8	196	56.1	16.8	123
1982	132	26.4	182	54.2	16.3	113
1981	126	25.2	166	53.6	16.1	106
1980	107	21.4	135	50.0	15.0	95
1979	122	24.4	148	53.7	16.1	102
1978	135	27.0	157	56.3	16.9	102
1977	130	26.0	148	54.6	16.4	95
1976	123	24.6	132	49.2	14.8	84
1975	125	23.7	125	42.6	12.7	67
1974	124	24.8	127	44.4	13.3	68
1973	142	28.4	130	43.5	13.1	60
1970	130	26.0	118	37.9	11.4	51

(a) Estimates based on service stations holding 20% of the tire replacement market, and 30% of the replacement battery market.
Source: Tire and battery totals from Rubber Manufacturers Assn. and Battery Council International and estimates by NPN.

Battery Shipments Improve in 1984

Battery shipments (replacement and original equipment), rose 5% in 1984, topping the 70-million unit mark for the first time in history. Replacements amounted to 59.3-million units, up 5.8% over the preceding year. Original equipment requirements approached the 11-million mark as the automotive industry continued to gain ground. The difference wasn't much; nevertheless it was on the positive side for the second consecutive year.

Year	(Add 000)					% Change from previous year
	Replacements	% of Market	New cars & trucks	% of Market	Total market	
1984	59,333	84.5	10,925	15.5%	70,258	5.0%
1983	56,105	83.8	10,823	16.2	66,928	7.9
1982	54,214	87.4	7,819	12.6	62,033	0.8
1981	53,598	87.1	7,956	12.9	61,554	6.0
1980	50,063	86.2	8,009	13.8	58,072	-11.0
1979	53,746	82.4	11,480	17.6	65,226	-6.2
1978	56,389	81.4	12,910	18.6	69,299	3.0
1977	54,601	81.2	12,639	18.8	67,240	10.8
1976	49,202	81.0	11,477	19.0	60,679	17.6
1975	42,582	82.5	8,985	17.6	51,567	-5.3
1974	43,453	77.5	12,637	22.5	56,090	2.9
1970	37,389	81.9	8,239	18.1	45,628	0.5

Source: Replacement battery figures supplied by Battery Council International. New cars and trucks are U.S. factory sales figures provided by Motor Vehicle Manufacturers Assn.

Replacement Batteries

Replacement battery shipments totaled 59.3-million units in 1984, with 12-volt and 6-volt accounting for 89% of the total, according to Battery Council International. Here are the highlights of its annual report:

Replacement Batteries:

Passenger cars and light trucks:

12-volt: 47,354,534, or 79.8% of the total; 6-volt: 1,234,012, or 2.1% of the total.

Heavy duty commercial:

12-volt: 2,757,626, or 4.6% of the total; 6-volt: 1,775,217, or 3.0% of the total.

Original Equipment:

Passenger cars and light trucks:

12-volt: 10,936,003, or 85.6% of the total; 6-volt: 12,283, or 0.01% of the total.

Heavy duty commercial:

12-volt: 838,211, or 6.6% of the total; 6-volt: 52,458, or 0.04% of the total.

Source: Battery Council International, April 1985.

Where Batteries Are Sold

Channels of Distribution	Shipments in Units					
	1984			1983		
	Private Brands	Mfg. Own Brand	Total	Private Brands	Mfg. Own Brand	Total
Gasoline and Oil	1,920,647	265,700	2,186,347	1,932,053	224,242	2,156,295
Tires and Rubber	2,167,830	362,062	2,529,892	2,371,630	289,244	2,660,874
Department and Discount Stores	12,735,498	363,609	13,099,107	12,629,457	71,069	12,700,526
Auto Chains and Others	6,600,478	891,614	7,492,122	5,957,735	546,615	6,504,350
Fleet Operations	9,629	377,091	386,720	8,121	336,053	344,174
Vehicle & Equipment Mfrs.	2,159,402	285,706	2,445,108	2,014,058	336,519	2,350,577
Parts Distribution	4,243,318	6,609,980	10,853,298	4,020,838	5,312,637	9,333,475
Battery Specialists	13,527,685	4,619,082	18,146,767	13,273,978	4,419,869	17,693,847
Others	552,759	436,720	989,479	467,441	577,019	1,044,460
Total	43,917,246	14,211,594	58,128,840	42,675,398	12,113,267	54,788,665

(a) Includes government data.

Source: Battery Council International; figures based on estimates submitted by 20 member firms.

Tire Shipments Rise Again in 1984

Tire shipments blossomed anew in 1984, rising for the second consecutive year. Original equipment shipments were up 16.3%, a healthy increase in their own right but not quite as hefty, however, as 1982's upward bounce of 28.6%.

Total shipments of all types of tires were up 10.8% in 1983. This can only be considered good news for an industry that has been in the doldrums in recent years.

'84 vs. '83	Passenger(s)	Bus/Truck	Farm Equipment	Total by Type of Market
Original Equipment . . .	16.3%	40.9%	0.9%	18.7%
Replacement	7.9	4.6	18.3	7.5
Export	44.2	29.4	34.8	41.1
Total by Type	10.8%	10.8%	14.1%	10.8%

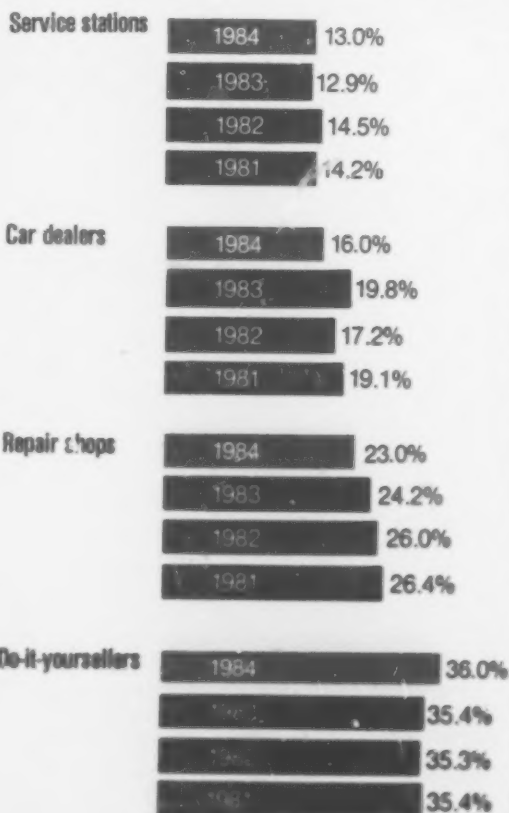
(a) RMA dropped motorcycle tires in 1984 because of inadequacy of data.
Source: NPN, based on Rubber Manufacturers Assn. Monthly Statistical Report.

Auto, Truck and Farm Shipments

	Passenger (a)	% of Market	Type of Tire (Add 000)		Farm Equipment	% of Market	Total of Market Type	% of Total
			Bus/Truck	% of Market				
1984								
Original Equipment	50,993	85.4%	7,777	13.0%	920	1.5%	59,690	24.2%
Replacement	144,580	80.8	31,707	17.7	2,592	1.4	178,879	72.7
Export	6,064	80.0	1,333	17.6	182	2.4	7,579	3.1
Total	201,637	81.9%	40,817	16.6%	3,694	1.5%	246,148	—%
1983								
Original Equipment	43,845	87.2%	5,519	11.0%	912	1.8%	50,276	22.6%
Replacement	133,964	80.5	30,301	18.2	2,191	1.3	166,456	74.9
Export	4,206	78.3	1,030	19.2	135	2.5	5,371	2.4
Total	182,015	82.0%	36,850	16.6%	3,238	1.5%	222,103	—%

(a) RMA dropped motorcycle tires in 1984 because of inadequacy of data.
Source: Rubber Manufacturers Assn., Monthly Statistical Report.

Where consumers get tuneups



1984 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.)	
	Civilian	Government
Packaged ethylene glycol antifreeze sold in quart and gallon sizes	131,076,230	-0-
in drums	13,638,307	(*)
Total	144,716,537	(*)
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	52,721,827	(*)
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	17,307,727	
Total	214,746,091	4,291,961
Grand total (civ. and gov't.)	219,038,052	

1983 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.)	
	Civilian	Government
Packaged ethylene glycol antifreeze in quarts	204,890	-0-
in gallons	133,303,749	-0-
in drums	12,314,161	-0-
Total	145,822,800	-0-
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	59,688,409	-0-
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	16,761,344	-0-
Grand total	222,272,553	(*)

(*) Data not shown, except for total, to avoid disclosure of individual company data.
Source: Chemical Specialties Manufacturers Assn.

Outlook Brightens for Parts and Services

After the lackluster performances of recent years, the automotive parts and services business is beginning to look up again, according to the Bureau of Industrial Economics of the U.S. Department of Commerce.

The Bureau projects almost heady growth for 1985 in the number of establishments, total sales and average sales per unit. In a revised set of figures, it now appears that 1983 was the bottoming-out year.

At that, however, the 1985 forecast of 38,034 establishments is far below the peak year of 1977 when the franchised industry total was around 48,700.

The growth in 1984 over 1983 was an almost insignificant 0.6%. But between 1984 and 1985, the growth rate was much better, a healthy 3.4%. By way of contrast, the 48,700 establishments in peak year 1977 aggregated only \$6.5-billion in sales versus 1985's projection of \$10.6-billion for 10,000 fewer stores.

Automotive Products/Services (a)

	1985 (b)	1984 (b)	1983
Total number of establishments	38,034	36,772	36,541
Company-owned	4,421	4,259	4,268
Franchise-owned	33,613	32,513	32,278
Total sales of products and services (Add \$000) (c)	10,603,578	9,561,054	8,724,942
Company-owned (c)	3,473,818	3,129,499	2,894,465
Franchise-owned (c)	7,130,060	6,434,580	5,830,477
Average sales per establishment (c)	\$279,000	\$260,000	\$239,000
Company-owned (c)	786,000	734,000	678,000
Franchise-owned (c)	212,000	196,000	180,000

(a) Includes tire, battery and accessory stores; auto and truck wash services; and brake and muffler repair and service; (b) Data estimated by respondents; (c) Includes sales of non-automotive products such as household appliances, garden supplies, etc.
Source: "Franchising in the Economy, 1983-1985," Bureau of Industrial Economics, U.S. Department of Commerce, February 1985.

Passenger Car Lubrication Service

1985 Crankcase Drain Intervals and Recommended Oil

Make	Engine	Normal Service		Severe Service		Type Of Oil
		Miles	Months	Miles	Months	
American Motors	All	7,500	7.5	—	—	SF
Chrysler Corp.	Turbo	7,500	6	3,000	3	SF-CC SF-CD(a)
	Others	7,500	12	3,000	3	SF
Ford Motor Co.	Turbo	5,000	—	3,000	3	SF
						SF-CC SF-CD
	2.0 L Diesel	7,500	7.5	3,000	3	SF-CC SF-CD
	2.4 L Diesel	5,000	—	3,000	3	SF-CC SF-CD
	Others	7,500	12	3,000	3	SF SF-CC SF-CD
General Motors	Gasoline	7,500(b)	12	3,000(b)	3	SF SF-CC SF-CD
	4-cyl. Diesel	3,750	12	2,000	3	SF-CC SF-CD
	6&8-cyl. Diesel	5,000	12	2,500	3	SF-CC SF-CD
						SF-CC SF-CD

(a) preferred

(b) 4-cyl. turbo, 3,000 miles or 3 months.

Source: Gousha/Chak-Chart.

1985 Automatic Transmission/Transaxle Drain Intervals and Recommended Fluids

Make	Fluid	Normal Service		Severe Service	
		Months	Miles	Months	Miles
American Motors	Dexron®-II	30	30,000	—	—
Chrysler Corp.	Dexron®-II	—	(a)	—	15,000
Ford	Dexron®-II (b)	—	(a)/	—	30,000
Motor Co.	Dexron®-II	—	100,000	—	15,000
General Motors	Dexron®-II	—	100,000	—	15,000

(a) Drain not required for normal service.

(b) C-5 trans. uses type H Fluid.

Source: Gousha/Chak-Chart.

1985 Chassis Lubrication Intervals

Make	Normal Service		Severe Service		Type	Part or Specification No.
	Months	Miles	Months	Miles		
American Motors	7.5	7,500(a)	Shorter - intervals		#2 Lithium EP	8993130
Chrysler Corp.	36	30,000	18	15,000	#2 Barium EP	4318062
Ford Motor Co.	—	30,000	—	15,000	#2 Lithium EP with polyethylene (s-molybdenum disulfide) (suspension)	
General Motors					#4-5 Lithium (steering)	M1C75-B M1C92-A Type II
	Gasoline	12	7,500	6	#1-2 Multipurpose EP	6031-M
	Diesel	12	5,000	6	#1-2 Multipurpose EP	6031-M

(a) Except front-wheel drive models.

Source: Gousha/Chak-Chart. Reprinted with permission.



Total Systems, Total Responsibility.

Ten years ago, STS Systems set out to design integrated computer systems for the petroleum industry. We designed them to be total, in-house and fully-integrated, and to cover every kind of petroleum operation. Today, STS has over 150 systems up and running for clients ranging from small dealers to major oil companies. Here's what we offer.

A total System. STS systems design accommodates every need in the petroleum business... wholesale petroleum products, home heat, burner service, gasoline station accounting, convenience store accounting, accounts payable, general ledger, fixed assets and financial reporting. It's tailor-made for the industry.

Up-to-the minute product flow & cash flow. STS petroleum systems monitor product flow from the millions to the billions of gallons. The online, interactive processing capability allows for information to be accurate and up to date. The benefit, for bulk distributors, gasoline retailers or home heating specialists, is the same: instant information, for better management control, for increased profits.

On-the-job staff training. STS provides comprehensive user documentation, post-installation audit and review to ensure the most effective use of the system

and an education program for your regular staff. There's no need for programmers or data processing specialists. STS increases efficiency, not manpower.

Customer Support. With STS, you get 24-hour-a-day, 7 days-a-week, 365 days-a-year on-going software support and fast on-site hardware maintenance. It's single-source responsibility that you can count on 100%.

System improvement that never stops. STS Systems never cease to be enhanced and improved. More benefits are provided with each new release of software. That's because we're responsive to your needs and have an on-going commitment to R.&D.

For more about STS Systems, call 1-203-348-8055 or 1-514-631-7291.

sts systems
Helps keep your product flowing

Exclusive 1984 Service Job Analysis: Fewer Stations, But More Money Made

There are fewer service stations doing repair work these days, but, as has been the story since 1972, they are garnering a bigger share of the \$75.8-billion auto service market.

According to Hunter Publishing Company's exclusive 1984 *Service Job Analysis*, the total number of stations performing repair and service dropped a bit from 120,000 in 1981 to 115,000 in 1984, but the average dollar volume soared from \$108,700 per outlet to \$164,500 in 1984—a 51% increase.

In fact, all three types of auto repair outlets—service stations, independent repair shops, and new car/truck outlets—showed increases in dollar volume, with the entire service market ringing up \$75.8-billion—a 41% hike over 1981's \$53.9-billion.

The table below presents data selected from the SJA's major repair/service categories. It shows totals by individual market segments, along with the percentage of jobs performed by each segment.

The data is based on a service dealer universe of 329,000 outlets: 115,000 service stations, 150,000 independent repair shops, 25,000 new car/truck dealers, and 39,000 fleet service locations. The fleet service segment has been left out of the tables because it pertains more to truck repair than automobile service. The SJA does not include figures for discount stores, auto repair chains or other non-traditional repair outlets.

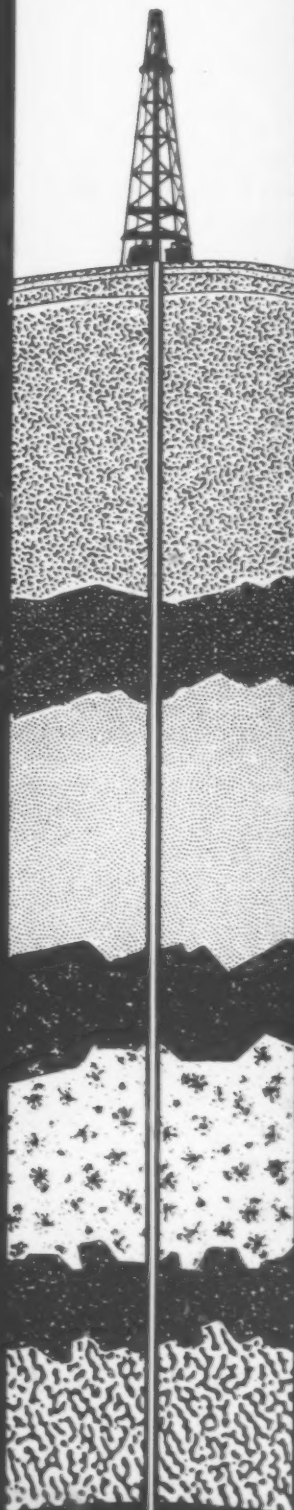
Job	Total Jobs* Performed (Add 000)	Service Stations		Independent Repair Shops		New Car/Truck Dealers	
		Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs
LUBRICATION							
Lube Jobs—Car	139,316	68,591	49.2%	34,301	24.6%	28,072	20.1%
Oil Changes—Car.....	148,122	71,944	48.6	36,043	24.3	32,692	22.1
Engine Oil Sold—Quarts	838,941	417,871	49.8	204,434	24.4	146,077	17.4
Oil Filters Replaced—Car	126,848	63,115	49.8	33,936	26.8	28,060	22.1
Air Filters Replaced	55,267	24,709	44.7	19,338	35.0	10,279	18.6
CARBURETOR/FUEL PUMP							
Carburetors Installed	1,553	529	34.1	785	50.5	134	8.6
Fuel Pumps Installed	5,582	2,358	42.2	2,208	39.6	700	12.6
Fuel Filters Replaced	42,313	15,962	37.7	17,383	41.1	8,220	19.4
Fuel Injection Serviced.....	2,469	303	12.3	1,007	40.8	1,123	45.5
IGNITION/TUNE-UP							
Engine Tune-Ups—Car	58,422	19,949	34.1	25,902	44.3	11,162	19.1
Spark Plugs—New	322,310	112,680	35.0	144,814	44.9	56,147	17.4
ELECTRICAL SERVICE							
Batteries Sold	27,098	14,447	53.3	8,796	32.5	2,266	8.4
Batteries Recharged.....	47,784	26,478	59.6	12,976	27.2	4,021	8.4
Battery Cables Sold	15,909	7,117	44.7	6,483	40.8	1,266	8.0
Starters Installed	1,807	652	36.1	791	43.8	268	14.8
Voltage Regulator Installed	6,597	2,609	39.5	2,889	43.8	746	11.3
Sealed Beam Headlights Sold	27,497	15,504	54.7	8,478	30.8	2,583	9.4
COOLING SYSTEM							
Systems Flushed.....	13,576	6,307	46.5	5,020	37.0	1,747	12.9
Radiators Repaired In-Shop	5,512	1,942	35.2	2,634	47.8	617	11.2
Radiators Replaced	4,453	1,887	42.4	2,115	47.5	343	7.7
Radiator Hose Replaced	25,865	12,514	48.4	10,153	39.3	2,234	8.6
Belts Installed—All Types	52,087	24,503	47.0	19,683	37.8	5,650	10.8
Water Pumps Replaced.....	6,533	2,211	33.8	2,999	45.9	1,067	16.3
Antifreeze Sold—Gal.....	78,930	36,472	46.2	26,257	33.3	9,954	12.6

Job	Total Jobs* Performed (Add 000)	Service Stations		Independent Repair Shops		New Car/Truck Dealers	
		Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs
EXHAUST SYSTEM							
Mufflers Replaced	13,793	5,917	42.9	5,704	41.4	1,948	14.1
Tail Pipes Replaced	12,520	5,446	43.5	5,218	41.7	1,391	11.1
Exhaust Pipes Replaced	6,653	2,776	41.7	2,751	41.3	757	11.4
Catalytic Converters Replaced.....	1,215	234	19.3	272	22.4	666	54.8
TRANSMISSION/CLUTCH							
Standard Transmissions							
Overhauled.....	1,291	94	7.3	568	44.0	481	37.3
Automatic Transmissions							
Overhauled.....	2,665	238	8.9	1,031	38.7	1,294	48.6
Automatic Transmission							
Fluid—Quarts.....	102,081	41,499	40.7	36,830	36.1	18,581	18.2
Universal Joints Replaced.....	11,485	4,931	42.9	5,431	47.3	888	7.7
Clutches Replaced	1,569	340	21.7	742	47.3	440	28.0
ALIGNMENT/SUSPENSION							
Wheels Balanced—							
Static/Dynamic.....	30,661	16,249	53.0	9,817	32.0	3,178	10.4
Wheels Balanced—Computer.....	38,662	19,917	51.5	13,139	34.0	5,149	13.3
Front-End Alignment.....	22,216	5,216	23.5	11,236	50.6	5,410	24.4
Shock Absorbers Replaced.....	25,509	10,270	40.3	12,212	47.9	2,151	8.4
MacPherson Strut Cartridges							
Replaced.....	4,064	948	23.3	2,415	59.4	626	15.4
BRAKES							
Drum Brake Shoes							
Installed.....	24,837	9,685	39.0	11,608	46.7	3,135	12.6
Master Cylinder Replaced.....	4,473	1,475	33.0	2,454	54.9	400	8.9
Brake Drums Replaced	2,965	1,074	36.2	1,443	48.7	337	11.4
Brake Drums Turned/Grnd.....	27,217	9,213	33.9	13,697	50.3	3,487	12.8
Disc Brake Pads Replaced.....	31,360	11,855	37.8	14,494	46.2	4,567	14.6
Disc Brake Rotors Resurf.....	30,747	9,819	31.9	16,723	54.4	3,725	12.1
Disc Brake Rotors Replaced.....	4,765	1,740	36.5	2,237	46.9	655	13.7
TIRE SERVICE							
Tires Sold—Car.....	41,277	26,140	63.3	12,282	29.8	2,132	5.2
Tires Mounted—Car.....	64,688	45,029	69.6	15,579	24.1	2,599	4.0
Tires Repaired.....	72,779	59,405	81.6	9,737	13.4	890	1.2
CHEMICALS							
Engine Oil Additive	13,029	6,977	53.5	3,244	24.9	2,495	19.1
Gasoline Additive	17,363	11,103	63.9	4,363	25.1	1,501	8.6
Transmission Additive	4,452	2,016	45.3	1,749	39.3	638	14.3
ACCESSORIES							
Windshield Wiper Refills	38,861	22,210	57.2	11,044	28.4	4,045	10.4
Windshield Wiper Blades							
Replaced.....	14,748	7,456	50.6	4,251 ^a	28.8	1,716	11.6
Air Conditioners Serviced	17,848	7,336	41.1	6,239	35.0	3,869	21.7
MISCELLANEOUS							
Road Service Calls	24,231	14,915	61.6	6,773	28.0	830	3.4
Towing.....	18,399	8,075	43.9	6,719	36.5	3,186	17.3

*Segment figures and percentages will not add up to total—remainder is accounted for by self-service fleet locations.

**Discovering
oil is still
uncertain.**

**Discovering
its price
is not.**



Historically, discovering the price of oil has been as difficult as discovering oil itself.

The NYMEX futures market has changed that.

Energy futures, launched on the New York Mercantile Exchange in 1978, provide price discovery and risk management to all segments of the industry worldwide — producers, refiners, traders, marketers and end-users.

With its contracts in crude oil, heating oil, leaded and unleaded gasoline, NYMEX adds visibility and choice to a once administered market.

NYMEX has been a major market for commodity pricing since 1872. Now it's also providing information on the free-market price of oil — the world's largest commodity.

Although discovering oil is still uncertain, discovering its price is not.

The difference is NYMEX.



**NYMEX Energy Futures:
The Free-Market Price**

NEW YORK MERCANTILE EXCHANGE

Four World Trade Center
New York, NY 10048 212/938-2879

Please rush me your free brochure.

NAME _____

COMPANY _____

ADDRESS _____

CITY _____

STATE/ZIP _____

TELEPHONE _____

U.S. Refineries and Capacities by States

(Crude Oil Operable Capacity on Jan. 1, 1984)

(* after number indicates capacity shut down but capable of being placed in operation within 90 days.)

Company	b/d	Company	b/d	Company	b/d
Alabama: Gulf		Huntway Refining Co. of		Moreco Energy, McCook	1,000
Louisiana Land & Exploration Co.,		Northern California, Van Nuys	6,750	Shell Oil Co., Wood River	250,000
Mobile	41,300	Huntway Refining Co.,		Texaco, Lawrenceville	54,000
	38,700*	Wilmington	4,750		30,000*
Mobile Bay Refining Co.,		Independent Valley Energy Co.,		Union Oil Co. of California,	
Chickasaw	26,600*	Bakersfield	27,000	Lemont	151,000
Total	41,300	Kern Oil & Refinery Co.,		Total	860,500
	38,700*	Bakersfield	21,400		105,000*
Alabama: Inland		Lunday-Thagard Oil Co.,		Indiana	
Hunt Oil Co., Tuscaloosa	33,500	South Gate	3,700	Amoco Oil Co., Whiting	376,000
Vulcan Refining Co.,		MacMillan Petroleum, Inc.,		Gladioux Refinery, Fort Wayne	19,000
Tuscaloosa	9,500*	Long Beach	11,000	Indiana Farm Bureau Cooperative	
Warrior Asphalt Co. of Alabama,		Marlex Oil & Refining,		Assn., Mount Vernon	21,200
Holt	4,000	Long Beach	21,100	Kentucky Oil & Refining Co.,	
	1,500*	Mobil Oil Corp., Torrance	123,500	Troy	1,000*
Total	37,500	Newhall Refining Co. Inc.,		Laketon Refining Corp., Laketon	7,900
	11,000*	Newhall	21,400	Rock Island Refining Corp.,	
Alaska		Oxnard Refinery, Oxnard	4,000	Indianapolis	43,200
Atlantic Richfield Co.,		Pacific Oasis Corp., Paramount	32,000	Total	467,300
North Slope	20,000		14,500*		1,000*
Chevron U.S.A., Kenai	22,000	Pacific Refining Co., Hercules	56,000	Kansas	
Mapco Petroleum Co.,		Powerline Oil Co., Santa		Derby Refining Co., North Wichita	27,982
(Formerly North Pole		Fe Springs	44,120	Farmland Industries, Coffeyville	56,500
Refining Co.) North Pole	45,000	San Joaquin Refining Co.,		Phillipsburg	26,400
Tesoro Petroleum Corp., Kenai	48,500	Bakersfield	10,000	Getty Refining & Marketing Co.,	
Total	135,500		14,300*	El Dorado	80,577
Arkansas		Shell Oil Co., Martinez	91,400	National Cooperative Refinery	
Cross Oil & Refining Co.,		Wilmington	93,000	Assn., McPherson	54,000
Smackover	6,700	Sunland Refining Corp.,		Pester Refining Co., El Dorado	33,250
	2,700*	Bakersfield	12,000	Total Petroleum, Arkansas City	42,500
Crystal Oil Co., Stephens	3,200	Texaco Inc., Wilmington	75,000	Total	322,027
MacMillan Petroleum, Inc.,		Tosco Corp., Avon	126,000		0*
Norphlet	4,600	Bakersfield	38,800	Kentucky	
	1,280*	Union Oil Co. of California,		Ashland Oil, Catlettsburg	213,400
Tosco Corp., El Dorado	38,500	Arroyo Grande	41,000	Louisville	25,200*
	8,500*	Rodeo	70,000	B-T Energy Corp., Louisville	3,000
Total	53,000	Wilmington	86,500	Kentucky Oil & Refining Co.,	
	12,480*		21,500*	Betsy Lane	600*
California		U.S.A. Petrochem Corp., Ventura	24,000	Somerset Refinery Inc., Somerset	5,500
Anchor Refining Co., McKittrick	9,000*	West Coast Oil Co., Oildale	19,000*	Total	221,900
Atlantic Richfield Co., Carson	188,000	Witco Chemical Corp., Oildale	0		25,800*
	27,000*	Total	2,257,720	Louisiana: Gulf	
Beacon Oil Co., Hanford	17,300		266,320*	Canal Refining Co., Church Point	8,000
Champlin Petroleum Co.,		Colorado		Celeron Oil & Gas Co.,	
Wilmington	60,000	Asamera Oil (U.S.),		Mermentau	11,000*
Chevron U.S.A., Bakersfield	26,000	Commerce City	26,000	Citgo Petroleum Corp.,	
El Segundo	390,000	Conoco, Commerce City	32,500	Lake Charles	297,000
	15,000*	Gary Western Co., Fruita	13,100		23,000*
Richmond	294,000	Total	71,600	Clark Oil & Refining Corp.,	
	71,000*	Delaware		Mt. Airy	0
Coastal Petroleum, Inc., Paloma	10,000	Getty Refining & Marketing Co.,		Conoco, Egan	1,500
Conoco, Santa Maria	9,500	Delaware City	140,000		5,000*
Demmenno-Kerdoon, Compton	10,000	Georgia		West Lake	156,500
ECO Petroleum, Long Beach	0	Amoco Oil Co., Savannah	24,000	CPI Oil & Refining, Lake Charles	9,500
Edgington Oil Co., Long Beach	22,800	Young Refining Corp.,			4,000*
	18,720*	Douglasville	4,500	Exxon Co. U.S.A., Baton Rouge	455,000
Exxon Co. U.S.A., Benicia	109,000	Total	28,500	Gulf Oil Corp., Belle Chasse	198,500
Fletcher Oil & Refining Co.,		Hawaii		Hill Petroleum Co., Krotz Springs	46,000
Carson	29,500	Chevron U.S.A., Honolulu	48,000		11,400*
Getty Refining & Marketing Co.,		Illinois		International Processors,	
Bakersfield	38,000	Clark Oil & Refining Corp.,		St. Rose	28,356*
	10,400*	Blue Island	57,000	Marathon Oil Co., Garyville	255,000
Golden Eagle Refining Co.,		Hartford	47,500	Murphy Oil U.S.A., Meraux	78,000
Carson	16,170	Marathon Oil Co., Robinson	120,000	Placid Refining Co., Port Allen	45,000
Golden West Refining Co.,			75,000*	Shell Oil Co., Norco	218,200
(Formerly Gulf Oil Corp.)		Mobil Oil Corp., Joliet	180,000	Tenneco Oil Co., Chalmette	114,000
Santa Fe Springs	42,000			Texaco, Convent	140,000

Company	b/d	Company	b/d	Company	b/d
Texas NAPCO, St. James (Formerly LaJet Inc.)	20,000	Southern Union Refining Co., Lovington	36,100	Tennessee	
Total	2,022,090	Thrifty Oil Co., Bloomfield	6,100	Mapco Petroleum Co., (Formerly Delta Refining Co.)	
	114,956*	Total	106,830	Memphis	60,000
			2,200*		
Louisiana: Inland		New York: East		Texas: Gulf	
Atlas Processing Co., Shreveport	45,000	Cibro Petroleum Products, Albany	41,850	American Petrofina Co. of Texas, Port Arthur	90,000
Calumet Refining Co., Princeton	3,200			Amoco Oil Co., Texas City	415,000
	1,200*	New York: West		Atlantic Richfield Co., Houston	232,000
Claiborne Gasoline Co., Lisbon	6,500	Ashland Oil, Buffalo	64,000*	Champlin Petroleum Co., Corpus Christi	155,000
Kerr-McGee Corp., Cotton Valley	7,800				15,000*
Dubach	10,000	North Carolina		Charter International Oil Co., Houston	65,000
Port Petroleum Inc., Stonewall	3,200*	GNC Energy Corp., Greensboro	3,000*	Coastal States Petroleum Co., Corpus Christi	87,500
Total	72,500			Conoco, Alvin/Texas City	33,274
	36,900*	North Dakota		Crown Central Petroleum Corp., Pasadena	100,000
Maryland		Amoco Oil Co., Mandan	56,000	Eddy Refining Co., Houston	3,250
Chevron U.S.A., Baltimore	14,200*	Flying J, Williston	1,830	Exxon Co. U.S.A., Baytown	494,000
Michigan		Total	57,830	Gulf Oil Corp., Port Arthur	406,000
Crystal Refining Co., Carson City	3,000		2,750*	Koch Refining Co., Corpus Christi	105,000
Lakeside Refining Co., Kalamazoo	5,600	Ohio: East		Marathon Oil Co., Texas City	20,500*
Marathon Oil Co., Detroit	68,500	Ashland Oil, Canton	66,000		
Total Petroleum, Alma	40,000			Mid-Gulf Energy Co., (Formerly Uni Refining Co.)	
Total	117,100	Ohio: West		Ingleside	39,400*
	0*	Ashland Oil, Findlay	20,400*	Mobil Oil Corp., Beaumont	275,000
Minnesota		Gulf Oil Corp., Cleves	43,700	Petromax, Houston	2,000*
Ashland Oil, St. Paul Park	67,143	Standard Oil Co. of Ohio, Lima	168,000	Phillips Petroleum Co., Sweeney	175,000
Koch Refining Co., Rosemount	137,000	Toledo	120,000	Quintana Petrochemical Co., Corpus Christi	33,300
Total	204,143	Sun Co., Toledo	118,000	Saber Refining Co., Corpus Christi	0
	0*	Total	442,700	Shell Oil Co., Deer Park	250,000
			60,400*	South Hampton Refining Co., Silsbee	18,100*
Mississippi: Gulf		Oklahoma		Southwestern Refining Co., Corpus Christi	63,000
Chevron U.S.A., Pascagoula	295,000	Allied Materials Corp., Stroud	7,600		41,000*
Mississippi: Inland		Conoco, Ponca City	134,000	Texaco, Port Arthur	341,000
Amerada Hess Corp., Purvis	30,000	Kerr-McGee Corp., Wynnewood	43,000		61,000*
Ergon Refining, Vicksburg	20,600*	Oklahoma Refining Co., Cyril	12,750	Port Neches	31,000
Southland Oil Co., Lumberton	5,800	Thomas	8,800	Texas City Refining, Texas City	119,600
Sandersville	11,000		2,800*	Union Oil Co. of California, Beaumont (Nederland)	22,000
Vicksburg Refining, Vicksburg	7,900*	Sinclair Oil Corp., (Formerly Texaco, Inc.)		Total	3,515,824
Total	46,800	West Tulsa	50,000		326,000*
	28,500*	Sun Co., Tulsa	85,000		
Montana		Tonkawa Refining Co., Arnett	12,000		
Cenex, Laurel	33,650	Tosca Corp., Duncan	47,000*		
	7,800*	Total Petroleum, Ardmore	62,000		
Conoco, Billings	48,500	Total	415,150		
Exxon Co. U.S.A., Billings	42,000		49,800*		
Flying J, Cutbank	5,600*	Oregon			
Kenco Refining, Wolf Point	4,700	Chevron U.S.A., Willbridge	15,000		
Simmons Refining Corp., Great Falls	6,300				
Total	136,150	Pennsylvania: East			
	13,400*	Atlantic Richfield Co., Philadelphia	125,000		
Nevada		BP Oil Corp., Marcus Hook	168,000		
Nevada Refining Co., Tonopah	4,500	Gulf Oil Corp., Philadelphia	174,100		
New Jersey		Sun Co., Marcus Hook	155,000		
Chevron U.S.A., Perth Amboy	80,000	Total	622,100		
	88,000*		0*		
Exxon Co. U.S.A., Linden	100,000	Pennsylvania: West			
Mobil Oil Corp., Paulsboro	100,000	American Refining Group, Indianola	200*		
Seaview Petroleum Co., Paulsboro	44,400	Ashland Oil, Freedom	6,800		
Texaco Inc., Westville	90,000	Coral Petroleum Inc., (Formerly United Refining Co.)			
Total	414,400	Warren	60,000		
	88,000*	Pennzoil Co., Rouseville	15,700		
New Mexico		Quaker State Oil Refining Corp., Smethport	6,700		
Caribou-Four Corners, Farmington	2,200*	Witco Chemical Corp., Bradford	6,841		
Giant Industries Inc., Gallop	18,000	Total	86,041		
Navajo Refining Co., Artesia	29,930		200*		
Plateau, Bloomfield	16,800				

Company	b/d	Company	b/d	Company	b/d
Utah		Texaco, Anacortes	78,000	Guam	
Amoco Oil Co., Salt Lake City	40,000	U.S. Oil & Refining Co., Tacoma	25,000	Guam Oil & Refining Co.,	
Carlou-Four Corners Oil Co.,		Total	398,900	Agana	43,900
Woods Cross	8,400*				
Chevron U.S.A., Salt Lake City	45,000	West Virginia		Puerto Rico	
Crysen Corp., Woods Cross	12,500	Quaker State Oil Refining Corp.,		Gulf Oil Corp., Bayamon	26,000
Husky Oil Co., North Salt Lake	25,000	Newell	9,515		10,000*
Morrison Petroleum Co.,		St. Mary's	4,650	Phillips Puerto Rico Core,	
Woods Cross	6,000*	Total	14,165	Guayama	0
Phillips Petroleum Co.,			0*	Sun Co., Yabucoa	85,000
Woods Cross	20,000			Total	111,000
Piateau, Roosevelt	7,500	Wisconsin			10,000*
Total	155,000	Murphy Oil Corp., Superior	39,000		
	14,400*				
Virginia		Wyoming		Hawaiian Foreign Trade Zone	
Amoco Oil Co., Yorktown	53,000	Amoco Oil Co., Casper	48,000	Hawaiian Independent Refinery,	
		Husky Oil Co., Cheyenne	28,800	Ewa Beach	60,000
Washington		Little America Refining Co.,			
Atlantic Richfield Co., Ferndale	136,000	Casper	24,500	Virgin Islands	
Chevron U.S.A., Richmond Beach	5,500	Mountaineer Refining Co.,		Amerada Hess Corp., St. Croix	515,000
Mobil Oil Corp., Ferndale	71,500	La Barge	200*		
Shell Oil Co., Anacortes	72,000	Sinclair Oil Corp., Sinclair	53,000		
Sound Refining, Tacoma	11,900	Wyoming Refining Co., Newcastle	12,555		
		Total	166,855		
			200*		

Source: Petroleum Supply Annual, 1984, Energy Information Administration.

Lubricating Oil and Wax Capacities of U.S. Refineries

(All capacities in 000 b/d in 1984)

Company	Location	Crude Capacity	Finished Lube Capacity				Wax Capacity		
			A	B	C	D	Total	E	F
Allied Materials Corp.	Stroud, Okla.	8.0	0.8				0.8	0.2	
Amoco Oil Co.	Casper, Wyo.	48.0	1.5		0.1		1.6	0.2	0.2
Amoco Oil Co.	Whiting, Ind.	376.0	6.2				6.2	0.6	
Ashland Oil, Inc.	Cattlettsburg, Ky.	220.0	7.9				7.9		2.0
Ashland Oil, Inc.	Freedom, Pa.	6.5							
Atlantic Richfield Co.	Houston, Tex.	232.0	4.4			2.0	6.4	0.4	0.4
Calumet Refining Co.	Burnham, Ill.	0.0				0.6	0.6		
Calumet Refining Co.	Princeton, La.	4.4				3.2	3.2		
Chevron U.S.A. Inc.	Richmond, Calif.	368.0	3.0	2.3			5.3	1.2	1.0
Cit-Con Oil Corp.	Lake Charles, La.		10.0				10.0	1.0	0.8
Conoco Inc.	Ponca City, Okla.	134.0	2.0				2.0	0.2	
Crosse Oil & Refining, Inc.	Smackover, Ark.	9.8				4.0	4.0		
Diamond Shamrock Corp.	Three Rivers, Tex.	2.0				2.0	2.0		
Exxon Co., U.S.A.	Baton Rouge, La.	455.0	13.8		2.7		16.5	1.5	
Exxon Co., U.S.A.	Baytown, Tex.	484.0	16.1	9.0		6.7	31.8		1.7
Farmland Industries, Inc.	Coffeyville, Kans.	58.5	2.5				2.5	0.2	
Gulf Refining and Marketing Co.	Port Arthur, Tex.	412.7	6.6	0.5	1.4	1.6	10.1		0.4
Lubrication Co. of America	Saugus, Calif.			0.5			0.5		
Macmillan Petroleum, Inc.	Norphet, Ark.	6.0				2.2	2.2		
Mobil Oil Corp.	Beaumont, Tex.	325.0	9.2				9.2	1.3	0.3
Mobil Oil Corp.	Paulsboro, N.J.	99.7	7.1				7.1		0.3
Pennzoil Co.	Falling Rock, W. Va.	0.0			0.0		0.0	0.0	0.0
Pennzoil Co.	Rouseville, Pa.	15.7			4.4		4.4	0.8	0.4
Pennzoil Co., Atlas Processing Co.	Shreveport, La.	76.5	3.6		1.4	2.7	7.7	1.0	
Petrolite Corp.	Barnsdell, Okla.							0.4	
Petrolite Corp., Sarsco Div.	Kilgore, Tex.	1.0							0.3
Phillips Petroleum Co.	Kansas City, Kans.	0.0	0.0				0.0		0.0
Quaker State Oil Ref. Corp.	Emlenton, Pa.							0.7	
Quaker State Oil Ref. Corp.	Farmers Valley, Pa.	6.5	2.5				2.5	0.4	0.5
Quaker State Ref. Corp.	Newell, W. Va.	11.7			3.6		3.6		0.8
Quaker State Oil Ref. Corp.	St. Mary's, W. Va.	4.9	1.8				1.8		0.3
Shell Oil Co.	Deer Park, Tex.	285.0	4.5			4.4	8.9	1.2	
Shell Oil Co.	Martinez, Calif.	81.4		3.5		0.3	3.8		
Shell Oil Co.	Wood River, Ill.	283.0	5.0				5.0		0.7
Standard Oil Co. (Ohio)	Lima, Ohio	168.0	2.0		0.4		2.4		
Sun Co., Inc.	Marcus Hook, Pa.	155.0	5.5			10.5	16.0	1.0	
Sun Co., Inc.	Tulsa, Okla.	85.0	7.8				7.8	0.8	
Sun Co., Inc.	Yabucoa, Puerto Rico	85.0	6.5				6.5		1.7
Texaco U.S.A.	Port Arthur, Tex.	402.0	12.0	0.6		4.0	20.0	0.1	1.8
Union Oil Co. of Calif.	Nederland, Tex.	120.0	2.9				2.9	0.1	0.2
Union Oil Co. of Calif.	Rodeo, Calif.	70.0	4.0				4.0	0.5	1.8
Witco Chemical Corp.	Bradford, Pa.	7.8	1.8		0.8		2.6	0.2	
Witco Chemical Corp.	Oldale, Calif.	11.0		2.4		1.8	4.3		
TOTAL:		5132.9	190.6	18.8	19.3	46.1	233.8	13.7	18.6
Canadian Refineries									
Gulf Canada Ltd.	Clarkson, Ontario	78.8	4.8				4.8		1.0
Imperial Oil Enterprises Ltd.	Sarnia, Ontario	128.0	5.1	9.7			5.8	0.6	1.6
Imperial Oil Enterprises Ltd.	Strathcona, Alberta	180.0	2.8				2.8		1.1
International Waxes, Ltd.	Agincourt, Ontario							0.8	
Shell Canada Ltd.	Montreal East, Quebec	31.0	3.4				3.4		1.9
TOTAL:		289.8	18.0	9.7	9.9	9.9	19.7	1.4	4.7

Definitions: A—Solvent extracted paraffinic stocks; B—Solvent extracted naphthenic stocks; C—Unextracted paraffinic stocks; D—Unextracted naphthenic stocks; E—Fully refined, crude scale, and micro waxes; F—Semi-finished, slack waxes and petrolatums.

Source: National Petroleum Refiners Assn., Lubricating Oil and Wax Capacities, 1984.

There's no fueling our Boys can't handle.

Whether the job requires a small hand pump or a sophisticated debit-card retail system—there's a Gasboy that knows just what to do. As a result, our Boys don't flinch when faced with hard work. They're committed to deliver what they promise.

Gasboy offers you an extraordinary choice of hand and power motor fuel pumps or dispensers for individual use, fleet fueling, and retail marketing.

Gasboy innovation also brings you effective, *time tested* and *field proven* fuel management systems, ranging from simple, economical Mechanical Keytrol through easily expandable Electrical Keytrol, to

our ultra-modern ultimate —Cardtrol microprocessor-based card systems for fleet fueling and debit/credit-card marketing.

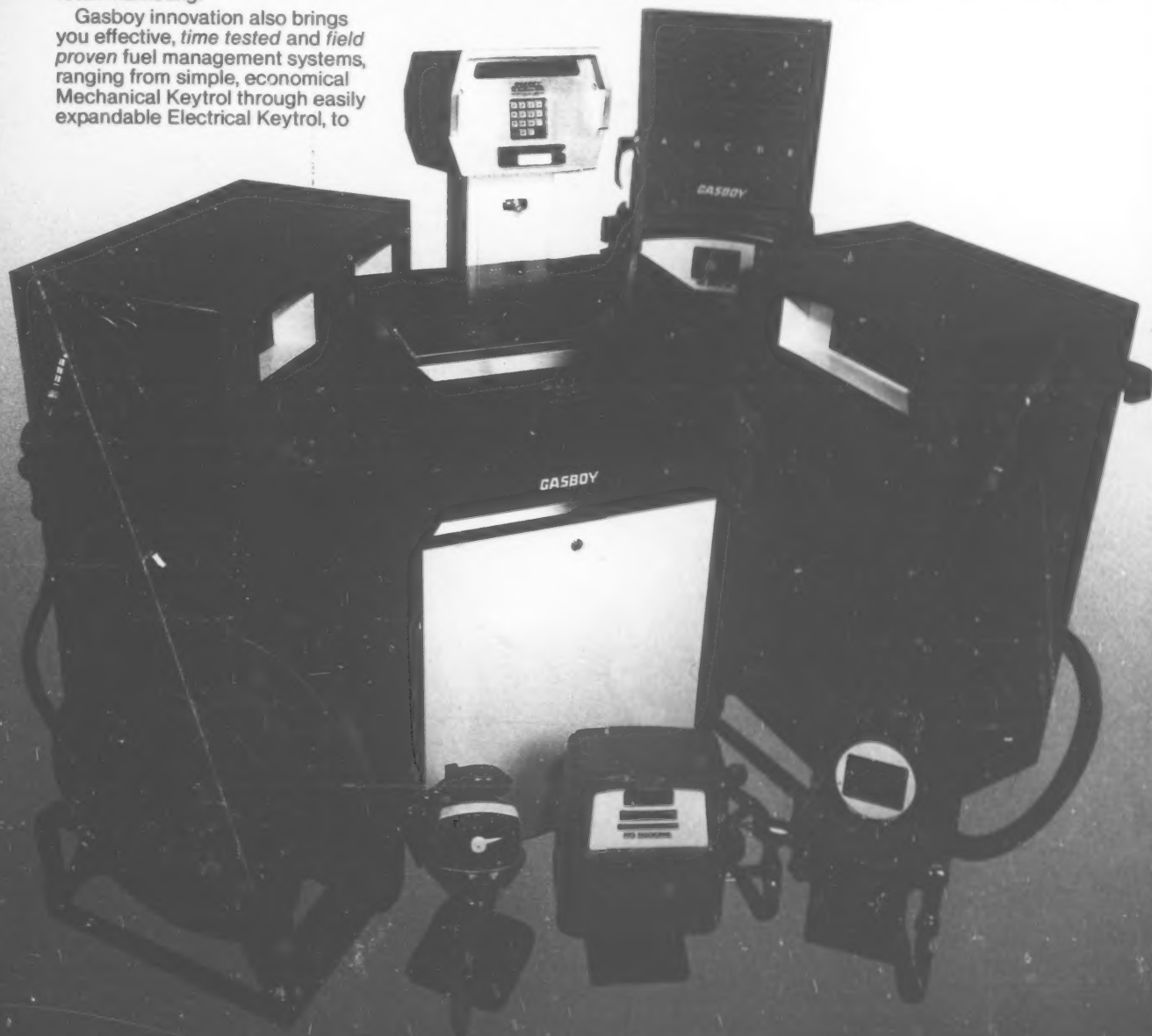
Everything we make includes something no one else can offer: Gasboy Quality—which assures years of reliability and trouble free service.

Whatever your needs—at the pump island or the job site—look first to Gasboy. That's the quickest

way to find the right thing. Call us at 215-855-4631, or write William M. Wilson's Sons, Inc., Box 309, Lansdale, PA 19446.

Congratulations!
It's a Boy!

GASBOY[®]
WILLIAM M. WILSON'S SONS, INC.



U.S. Refineries and Capacities by Companies

(In descending order as of Jan. 1, 1984)

Important note: This listing includes capacity that is operation and capacity that is idle or shut down. In the latter case, this capacity can be restored to normal within 90 days. The Energy Information Administration says there were 247 operable refineries on Jan. 1, 1984, compared with a total of 258 the preceding year. The crude distillation capacity was 16.1-million b/d, compared with the year ago figure of 16.9-million b/d. For earlier data, see 1984 NPN Factbook.

Companies with a capacity of more than 100,000 b/d. Number of companies: 31; Total capacity: 13,776,794.

Company	b/d
---------	-----

Standard Oil Co. of California

Chevron U.S.A.

El Segundo, CA	405,000
Richmond, CA	365,000
Pascagoula, MS	295,000
Perth Amboy, NJ	168,000
El Paso, TX	76,000
Honolulu, HI	48,000
Salt Lake City, UT	45,000
Bakersfield, CA	26,000
Kenai, AK	22,000
Willbridge, OR	15,000
Baltimore, MD	14,200
Richmond Beach, WA	5,500
Total	1,484,700

Exxon Corp.

Exxon Co. U.S.A.

Baytown, TX	494,000
Baton Rouge, LA	455,000
Benicia, CA	109,000
Linden, NJ	100,000
Billings, MT	42,000
Total	1,200,000

Standard Oil Co. of Indiana

Amoco Oil Co.

Texas City, TX	415,000
Whiting, IN	376,000
Mandan, ND	56,000
Yorktown, VA	52,000
Casper, WY	48,000
Salt Lake City, UT	40,000
Savannah, GA	24,000
Total	1,011,000

Shell Oil Co.

Wood River, IL	250,000
Deer Park, TX	250,000
Norco, LA	218,200
Wilmington, CA	93,000
Martinez, CA	91,400
Anacortes, WA	72,000
Odessa, TX	30,600
Total	1,005,200

Texaco Inc.

Port Arthur, TX	402,000
Convent, LA	140,000
Westville, NJ	90,000
Lawrenceville, IL	84,000
Anacortes, WA	78,000
Wilmington, CA	76,000
Port Neches, TX	31,000
Amarillo, TX	20,000
El Paso, TX	17,000
Total	937,000

Company	b/d
---------	-----

Gulf Oil Corp.

Port Arthur, TX	406,900
Belle Chasse (Alliance), LA	198,500
Philadelphia, PA	174,100
Cleves (Cincinnati), OH	43,700
Total	823,200

Mobil Oil Corp.

Beaumont, TX	275,000
Joliet, IL	180,000
Torrance, CA	123,500
Paulsboro, NJ	100,000
Ferndale, WA	71,500
Total	750,000

Atlantic Richfield Co.

Houston, TX	233,000
Carson (Watson), CA	215,000
Ferndale (Cherry Point), WA	135,000
Philadelphia, PA	125,000
North Slope, AK	20,000
Total	728,000

U.S. Steel Corp.

Marathon Oil Co.

Garyville, LA	255,000
Robinson, IL	195,000
Texas City, TX	69,500
Detroit, MI	68,500
Total	588,000

Union Oil Co. of California

Lemont (Chicago), IL	151,000
Beaumont (Nederland), TX	120,000
Wilmington, CA	108,000
Rodeo (San Francisco), CA	70,000
Arroyo Grande, CA	41,000
Total	490,000

Ashland Oil Inc.

Catlettsburg, KY	213,400
St. Paul Park, MN	67,143
Canton, OH	66,000
Buffalo, NY	64,000
Louisville, KY	25,200
Findlay, OH	20,400
Freedom, PA	6,800
Total	482,943

Standard Oil Co. of Ohio

Lima, OH	168,000
Toledo, OH	120,000

BP Oil Corp.

Marcus Hook, PA	168,000
Total	456,000

E.I. Du Pont De Nemours & Co.

Conoco Inc.

West Lake (Lake Charles), LA	156,500
Ponca City, OK	134,000
Billings, MT	48,500
Alvin/Texas City, TX	33,274
Denver (Commerce City), CO	32,500
Santa Maria, CA	9,500
Egan (Acadia), LA	6,500
Total	420,774

Sun Co. Inc.

Marcus Hook, PA	155,000
Toledo, OH	118,000
Tulsa, OK	85,000
Total	358,000

Southland Corp.¹

Citgo Petroleum Corp.²

Lake Charles, LA	320,000
------------------	---------

Phillips Petroleum Co.

Company	b/d
---------	-----

Sweeny, TX	175,000
Borger, TX	95,000
Woods Cross, UT	25,000
Total	295,000

Getty Oil Co.

Getty Refining & Marketing Co.

Delaware City, DE	140,000
El Dorado, KS	80,577
Bakersfield, CA	48,400
Total	268,977

Tosco Corp.

Avon, CA	126,000
El Dorado, AR	47,000
Duncan, OK	47,000
Bakersfield, CA	38,800
Total	258,800

Koch Industries Inc.

Koch Refining Co.

Rosemount, MN	137,000
Corpus Christi, TX	105,000
Total	242,000

Union Pacific Corp.

Champlin Petroleum Co.

Corpus Christi, TX	170,000
Wilmington, CA	60,000
Total	230,000

The Coastal Corp.³

Coastal States Petroleum Co.

Corpus Christi, TX	87,500
--------------------	--------

Pacific Refining Co.

Hercules, CA	55,000
--------------	--------

Derby Refining Co.

North Wichita, KS	28,800
Total	171,300

Kerr-McGee Corp.

Wynnewood, OK	43,000
Dubach, LA	10,000
Cotton Valley, LA	7,800

Southwestern Refining Co.

Corpus Christi, TX	104,000
Total	164,800

American Petrofina Co. of Texas

Port Arthur, TX	90,000
Big Spring, TX	60,000
Total	150,000

Total Petroleum Inc.

Ardmore, OK	62,000
Arkansas City, KS	42,500
Aims, MI	40,000
Total	144,500

Murphy Oil U.S.A. Inc.⁴

Meraux, LA	90,200
Superior, WI	39,000
Total	129,200

Earl Holding Co.⁵

Sinclair Oil Corp.

Sinclair, WY	53,000
West Tulsa, OK ⁶	50,000

Little America Refining Co.

Casper, WY	24,500
Total	127,500

Agway Petroleum Corp.

Texas City Refining Inc.

Texas City, TX	119,500
----------------	---------

Diamond Shamrock Corp.

Diamond Shamrock Refining

Company	b/d	Company	b/d	Company	b/d
& Marketing Co.⁷		Santa Fe Springs, CA	44,120	Woods Cross, UT	12,500
Sunray, TX	73,300	Rock Island Refining Corp.		Tacoma, WA	11,900
Sigmor Corp.		Indianapolis, IN	43,200	Total	24,400
Three Rivers, TX	43,500	Pride Refining Inc.		Oklahoma Refining Co.	
Total	116,800	Abilene, TX	42,750	Cyril, OK	12,750
Tenneco Oil Co.		Thrifty Oil Co.¹²		Thomas, OK	11,600
Chalmette, LA	114,000	Golden West Refining Co.		Total	24,350
Mid-America Pipe Line System		Santa Fe Springs, CA	42,000	San Joaquin Refining Co.	
Mapco Petroleum Co.		Cirillo Brothers Oil Co.		Bakersfield, CA	24,300
Memphis, TN ⁸	60,000	Cibrc Petroleum Products		Suburban Propane Gas Corp.	
North Pole, AK ⁹	45,000	Albany, NY	41,850	Plateau Inc.	
Total	105,000	Penn Central Energy Corp.¹³		Bloomfield, NM	16,800
Apex Oil Co.		Edgington Oil Co.		Roosevelt, UT	7,500
Clark Oil & Refining Corp.		Long Beach, CA	41,600	Total	24,300
Blue Island, IL	57,000	Farmers Union Central Exchange (Cenex)		U.S.A. Petrochem Corp.	
Hartford (Wood River), IL	47,500	Laurel, MT	41,450	Ventura, CA	24,000
Total	104,500	Mid-Gulf Energy Inc.¹⁴		Kern Oil & Refinery Co.	
Companies with capacity 30,001 to 100,000 b/d. Number of companies: 27; Total capacity: 1,417,290.		Ingleide, TX	39,400	Bakersfield, CA	21,400
Crown Central Petroleum Corp.		Southern Union Refining Co.		Pauley Petroleum	
Pasadena, TX	100,000	Lovington, NM	36,100	Newhall Refining Co.	
Pennzoil Co.		Hunt Oil Co.		Newhall, CA	21,400
Rouseville, PA	15,700	Tuscaloosa, AL	33,500	Indiana Farm Bureau Cooperative	
Atlas Processing Co.		American Ultramar Ltd.		Mount Vernon, IN	21,200
Shreveport, LA	76,500	Beacon Oil Co.		Marlex Petroleum Inc.	
Total	92,200	Hanford, CA	17,300	Marlex Oil & Refining	
Farmland Industries Inc.		Golden Eagle Refining Co.		Long Beach, CA	21,100
Coffeyville, KS	56,500	Carson, CA	16,170	Quaker State Oil Refining Corp.	
Phillipsburg, KS	26,400	Total	33,470	Newell (Congo), WV	9,515
Total	82,900	Quintana Refinery Co.		Smethport (McKean), PA	6,700
Louisiana Land & Exploration Co.		Quintana Petrochemical Co.		St. Mary's (Ohio Valley), WV ..	4,650
Mobile, AL	80,000	Corpus Christi, TX	33,300	Total	20,865
Tesoro Petroleum Corp.		Pester Corp.		Ergon Refining	
Kenai, AK	46,500	Pester Refining Co.		Vicksburg, MS	20,600
Carrizo Springs, TX	26,100	El Dorado, KS	33,250	E-Z Serv Inc.	
Total	74,600	Companies with capacity 10,001 to 30,000 b/d. Number of companies: 36; Total capacity: 739,516.		Amber Refining Co.	
Coral Petroleum		Amerada Hess Corp.		Fort Worth, TX	20,000
Warren, PA ¹⁰	60,000	Purvis, MS	30,000	Texas Napco Inc.	
Vulcan Refining Co.		Holly Corp.		St. James, LA	20,000
Tuscaloosa, AL	9,500	Navajo Refining Co.		Gladioux Refinery	
Total	69,500	Artesia, NM	29,930	Fort Wayne, IN	19,000
Charter International Oil Co.		Fletcher Oil & Refining Co.		West Coast Oil Co.	
Houston, TX	65,000	Carson, CA	29,500	Oildale, CA [*]	19,000
Goldking Refining Ltd.		International Processors		Texas Oil & Chemical Co.	
Hill Petroleum Co.		St. Rose, LA	28,356	South Hampton Refining Co.	
Krotz Springs, LA	57,400	Semrock California Inc.		Silsbee, TX	18,100
National Cooperative Refinery Assn.		Independent Valley Energy Co.		Giant Industries Inc.	
McPherson, KS	54,000	Bakersfield, CA	27,000	Gallup (Ciniza), NM	18,000
Husky Oil Co.		Mobile Bay Refining Co.		MacMillan Ring-Free Oil Co.	
Cheyenne, WY	28,800	Chickasaw, AL	26,600	MacMillan Petroleum Inc. ¹⁵	
North Salt Lake, UT	25,000	Dorchester Gas Corp.		Long Beach, CA	11,000
Total	53,800	Dorchester Refining Co.		Norphiet, AK	5,880
Pacific Oils Corp.		Mount Pleasant, TX	26,500	Total	16,880
Paramount, CA	46,500	Asamers Oil (U.S.)		Vermont Gas Systems (VGS)	
Texas Eastern Corp.¹¹		Commerce City (Denver), CO ..	26,000	Southland Oil Co.	
La Gloria Oil & Gas Co.		Time Oil Co.		Sandersville, MS	11,000
Tyler, TX	46,000	U.S. Oil & Refining Co.		Lumberton, MS	5,800
Placid Oil Co.		Tacoma, WA	25,000	Total	16,800
Placid Refining Co.		Crysan Corp.		CPI Oil & Refining	
Port Allen, LA	45,000	Seaview Petroleum Co.		Lake Charles, LA	13,500
Paulsboro, NJ	44,400	Powerline Oil Co.		Gary Energy Co.	
Powerline Oil Co.				Gary Western Co.	
				Fruits, CO	13,100

Company	b/d	Company	b/d	Company	b/d
Hermes Products Co.		Thriftyway Co.		⁹ Formerly North Pole Refining Co.	
Wyoming Refining Co.		Bloomfield, NM	6,100	¹⁰ Formerly United Refining Co.	
Newcastle, WY	12,555	Morrison Petroleum Co.		¹¹ Formerly Texas Eastern Transmission Corp.	
Ray Bell Oil Co.		Woods Cross, UT	6,000	¹² Formerly Gulf Oil Corp.	
Tonkawa Refining Co.		Somerset Refinery Inc.		¹³ Formerly Penn Central Corp.	
Arnett, OK	12,000	Somerset, KY	5,500	¹⁴ Formerly Uni Refining Inc.	
World Oil Co.		Warrior Asphalt Co. of Alabama		¹⁵ Formerly MacMillan Ring-Free Oil Co.	
Sunland Refining Corp.		Holt, AL	5,500	¹⁶ Formerly Sierra Anchor/Sierra Energy Assn.	
Bakersfield, CA	12,000	Huntway Refining Co.		¹⁷ Formerly TARCO	
Goodyear Tire & Rubber Co.		Wilmington, CA	4,750		
Celeron Oil & Gas Co.		Kenco Refining Inc.			
Mermentau, LA	11,000	Wolf Point, MT	4,700		
Caribou-Four Corners		Tropicana Energy Co.¹⁷			
Woods Cross, UT	8,400	Eules, TX	4,650		
Farmington (Kirtland), NM*	2,200	Nevada Refining Co.			
Total	10,600	Tonopah, NV	4,500		
Flying J Inc.		Young Refining Corp.			
Cutbank, MT	5,600	Douglasville, GA	4,500		
Williston, ND*	4,580	Calumet Industries			
Total	10,180	Calumet Refining Co.			
Companies with capacity 10,000 b/d or less. Number of companies: 39; Total capacity: 203,541.		Princeton, LA	4,400		
Coastal Petroleum Co.		Oxnard Refinery			
Paloma, CA*	10,000	Oxnard, CA	4,000		
Mitchell Energy Corp.		Eddy Refining Co.			
Liquid Energy Corp.		Houston, TX	3,250		
Bridgeport, TX	10,000	Crystal Oil Co.			
Howell Corp.		Stephens, AR	3,200		
San Antonio, TX	9,900	Port Petroleum			
Moore & Munger Inc.		Stonewall, LA	3,200		
Cross Oil & Refining Co.		B-T Energy Corp.			
Smackover, AR	9,400	Louisville, KY	3,000		
Gasco Gasoline Inc.¹⁸		Gibson Oil & Refining Co.			
Anchor Refining Co.		Bakersfield, CA*	3,000		
McKittrick, CA	9,000	GNC Energy Corp.			
Lakeside Refining Co.		Greensboro, NC	3,000		
Kalamazoo, MI	5,600	Petromax			
Crystal Refining Co.		Houston, TX	2,000		
Carson City, MI	3,000	Kentucky Oil & Refining Co.			
Total	8,600	Troy, IN	1,000		
Thagard Oil Co.		Betsy Lane, KY	600		
Lunday-Thagard Oil Co.		Total	1,600		
South Gate, CA	8,100	Flint Chemical Co.			
Anchor Gasoline Co.		San Antonio, TX	1,500		
Canal Refining Co.		Moreco Energy Inc.			
Church Point, LA	8,000	McCook, IL	1,000		
Laketon Refining Corp.		Petrolite Corp.			
Laketon, IN	7,900	Kilgore, TX	1,000		
Vicksburg Refining Inc.		American Refining Group Inc.			
Vicksburg, MS	7,900	Indianola, PA	200		
Allied Materials Corp.		Mountaineer Refining Co.			
Stroud, OK	7,600	La Barge, WY	200		
Witco Chemical Corp.					
Bradford, PA	6,841				
Huntway Refining Co. of Northern California					
Van Nuys, CA	6,750				
Claiborne Gasoline Co.					
Lisbon, LA	6,500				
Simmons Oil Co.					
Simmons Refining Corp.					
Great Falls, MT	6,300				

*Refinery was reactivated during 1983.
Source: Petroleum Supply Annual, 1984, Energy Information Administration.

¹Formerly Occidental Petroleum
²Formerly Cities Service Co.
³Formerly Coastal States Marketing Corp.
⁴Formerly Murphy Oil Corp.
⁵Formerly Little America Refining Co.
⁶Formerly Texaco Inc.
⁷Formerly Diamond Shamrock Corp.
⁸Formerly Delta Refining Co.

U.S. Refinery Closings—1981 through 1984

In 1984 another 18 refineries in the U.S. were shut down, paring the total of remaining facilities to 229. The shutdowns cost the industry 415,370 b/d of crude distillation capacity, but new construction and modifications to existing facilities during the year offset some of that, and the net loss ended up being about 360,000 b/d.

At the end of 1984, the U.S. had an operable refining capacity of about 16.1-million b/d, continuing the downward slide of recent years. The capacity is projected to fall to an average of 15.8-million b/d in 1985. With fewer facilities, however, refining utilization has been improving. The 1984 average was 76.4% compared to 1983's 71.7% and 1981's 68.5%.

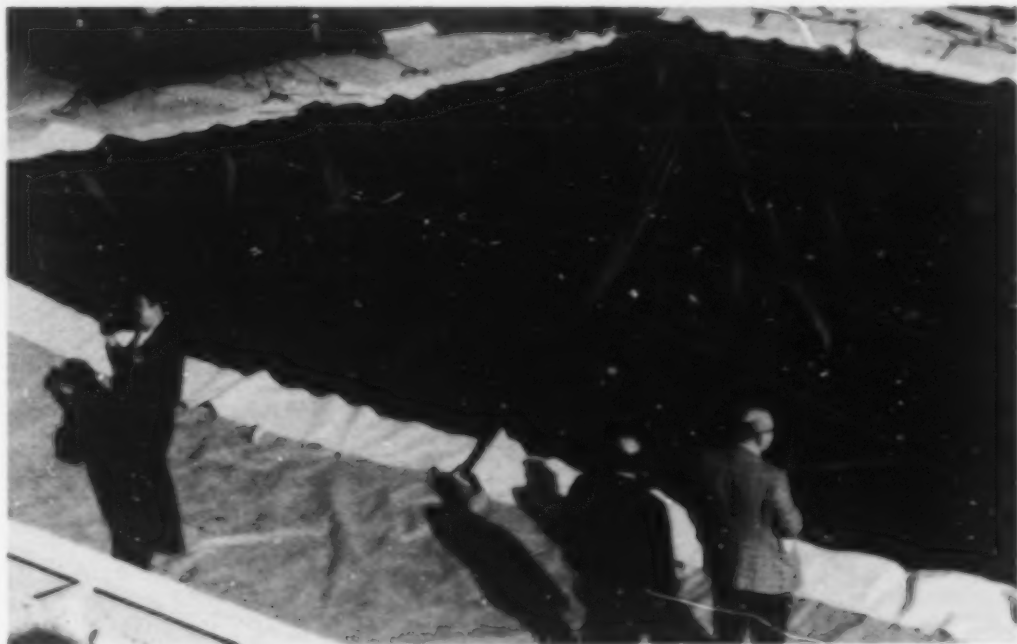
PAD District/Refinery	Location	Crude Distillation Capacity (B CD)	Total Downstream Capacity (B SD)	Date of Last Operation	Date Shutdown	Years in Operation
District 1						
Amerada Hess Corp.	Port Reading, N.J.	68,000	79,000	12 74	12 83	25
Amoco Oil Co.	Baltimore, Md.	15,000	0	1 82	3 82	25 +
ATC Petroleum Inc.	Wilmington, N.C.	11,900	0	7 81	1 82	8
ATC Petroleum Inc.	Newington, N.H.	13,400	0	7 81	1 82	7
ELK Refining Co., div. of Pennzoil Co. Inc.	Falling Rock, W.Va.	5,600	2,000	12 82	1 83	25 +
Manatee Energy Co.	Port Manatee, Fla.	28,400	0	5 81	10 81	2
Mobil Oil Corp.	Buffalo, N.Y.	43,000	67,000	5 81	7 81	25 +
Quaker State Oil Refining Corp.	Emlenton, Pa.	0	2,980	12 83	12 83	25 +
Seminole Refining Inc.	St. Marks, Fla.	15,000	10,000	12 81	4 82	25 +
Total		200,300	160,980	—	—	—
District 2						
Amoco Oil Co.	Sugar Creek, Mo.	104,000	185,500	5 82	6 82	25 +
Amoco Oil Co.	Wood River, Ill.	104,000	127,000	5 81	10 81	25 +
Champion Petroleum Co.	Enid, Okla.	53,800	58,500	6 83	12 83	25 +
Conoco Inc.	Wrenshall, Minn.	23,500	25,700	5 81	9 81	5
CRA, Inc.	Scottsbluff, Neb.	5,600	3,650	5 82	6 82	25 +
Dillman Oil Recovery Inc.	Obion, Ill.	1,200	0	1 81	2 82	4
Dow Chemical U.S.A.	Bay City, Mich.	20,000	0	5 80	9 81	25 +
E-Z Serv Refining Inc.	Shallow Water, Kan.	9,500	0	4 81	2 82	25 +
Energy Cooperative Inc.	East Chicago, Ind.	126,000	190,000	5 81	6 82	25 +
Energy Development	Crossville, Ill.	1,000	0	2 81	4 81	22
Gulf Oil Corp.	Toledo, Ohio	50,300	61,800	6 81	11 81	25 +
Hudson Refining Co. Inc.	Cushing, Okla.	19,000	12,150	12 82	11 83	6
Indiana Refining Inc.	Princeton, Ind.	5,000	0	12 80	2 81	23
Industrial Fuel and Asphalt of Indiana Inc.	Hammond, Ind.	7,600	0	12 81	6 82	25 +
Mid-America Refining Co. Inc.	Chanute, Kan.	3,000	1,800	3 81	7 82	25 +
Mobil Oil Corp.	Augusta, Kan.	50,000	83,900	9 83	9 83	25 +
Northland Oil and Refining Co.	Dickinson, N.D.	5,000	0	2 81	2 82	7
Oxmulgee Refining Co.	Okmulgee, Okla.	25,000	13,200	6 82	1 83	25 +
Phillips Petroleum Co.	Kansas City, Kan.	80,000	156,700	8 82	9 82	25 +
Texaco Inc.	Lockport, Ill.	72,000	136,000	4 81	10 81	25 +
Texas American Petrochemical Inc.	West Branch, Mich.	11,500	3,200	9 81	2 82	25 +
Tonkawa Refining Co.	Arnett, Okla.	12,000	6,000	1984	1984	16
Tosco Corp.	Duncan, Okla.	47,000	85,000	1984	1984	4
Wireback Oil Co.	Plymouth, Ill.	1,800	1,800	2 81	3 81	25 +
Total		838,600	1,151,900	—	—	—
District 3						
Adobe Refining Co., div. of Funding Systems Refining Corp.	La Blanca, Texas	5,200	0	11 81	1 82	25 +
Bayou State Oil Corp.	Hosston, La.	3,000	0	1 81	3 82	25 +
Brio Refining Inc.	Friendswood, Texas	12,500	0	9 82	1 83	4
Bronco Refining Co.	Houston, Texas	2,250	0	4 81	7 82	1
Carbonit Refining Inc.	Hearne, Texas	11,000	0	2 81	1 82	6
Caribou-Four Corners, Inc.	Farmington, N.M.	2,200	2,400	1984	1984	19
Celeron Oil & Gas Co.	Mermentau, La.	11,000	0	1984	1984	6
Clinton Manges	Palestine, Texas	6,000	0	7 81	7 82	25 +
Copano Refining Co.	Ingleside, Texas	11,100	0	9 81	2 82	4
Dorchester Refining Co.	Mt. Pleasant, Texas	26,500	38,800	1984	1984	6
Dow Chemical U.S.A.	Freeport, Texas	190,000	143,000	8 81	6 82	1
Eagle Refining Corp.	Jacksboro, Texas	1,800	0	3 81	7 82	1
Eddy Refining Co.	Houston, Texas	3,250	0	1984	1984	36 +
Erickson Refining Corp.	Pt. Neches, Texas	30,000	0	12 81	8 83	4
Evangeline Refining Co.	Jennings, La.	4,500	0	12 82	1 83	25 +
GHR Energy Corp.	Good Hope, La.	300,000	433,000	12 82	9 83	15
Giant Industries Inc.	Farmington, N.M.	13,500	5,000	5 82	11 82	7
Gulf Oil Corp.	Venice, La.	28,700	46,300	4 81	12 81	13
Hill Petroleum Co.	Knots Springs, Texas	57,400	62,000	1984	1984	7
Independent Refining Corp.	Winnie, Texas	50,000	63,000	10 81	8 83	23
Lake Charles Refining Co.	Lake Charles, La.	28,000	0	4 81	2 82	2
Listo Refining Co.	Donna, Texas	3,500	0	7 82	12 82	4
Longview Refining Co.	Longview, Texas	14,000	14,000	12 81	4 82	25 +
Mallard Resources Inc.	Gueydan, La.	7,400	0	11 83	12 83	4
Marion Corp.	Theodore, Ala.	25,000	14,500	3 83	9 83	15
McTan Refining Corp.	St. James, La.	19,300	0	7 81	8 83	6
Mid-Gulf Energy Corp.	Englewood, Texas	39,400	20,000	1984	1984	3
Natchez Refining Co.	Natchez, Miss.	16,000	0	6 82	9 82	2
Petraco-Valley Oil Refining Co.	Brownsville, Texas	12,300	0	3 83	12 83	5
Pioneer Refining Ltd.	Nixon, Texas	15,000	15,900	4 83	12 83	9
Placid Oil Co.	Mont Belvieu, Texas	8,500	0	1 82	7 82	2
Port Petroleum Co.	Stonewall, La.	3,200	0	1984	1984	5
Quintana Petrochem Co.	Corpus Christi, Texas	33,000	54,000	1984	1984	30

PAD District/Refinery	Location	Crude Distillation Capacity (B CD)	Total Downstream Capacity (B SD)	Date of Last Operation	Date Shutdown	Years in Operation
Quitman Refining Co.	Quitman, Texas	6,600	0	4/82	6/82	4
Rio Grande Crude Refining	Brownsville, Texas	9,500	0	6/81	6/82	3
Rio Grande Recovery Systems Inc.	Brownsville, Texas	1,000	0	5/81	2/82	2
Schulze Processing Inc.	Taluliah, La.	1,760	0	5/81	8/82	4
Sentry Refining Inc.	Corpus Christi, Texas	25,000	0	1/82	2/82	4
Shepard Oil Co.	Jennings, La.	10,000	0	5/81	2/82	4
Shore, Inc.	Kilgore, Texas	550	0	3/83	7/83	3
Sooner Refining Co.	Darrow, La.	8,000	32,200	1/82	2/82	2
Southern Union Refining Co.	Monument, N.M.	5,400	0	1/81	10/81	25+
Southern Union Refining Co.	Lovington, N.M.	36,100	18,500	1984	1984	8
Southland Oil Co.	Yazoo City, Miss.	5,500	3,080	2/81	7/81	25+
T & S Refining Co.	Jennings, La.	10,500	0	7/81	3/82	2
Tesara Petroleum Co.	Carrizo Springs, Texas	26,100	3,500	1984	1984	27
Texas Refining Co.	Midland, Texas	2,500	0	4/81	6/81	1
Texas Standard Refining Inc.	Houston, Texas	1,800	0	1/81	10/81	(S)
Thriftway Oil Co.	Graham, Texas	1,184	0	4/81	11/83	25+
Tipperary Refining Co.	Ingleside, Texas	7,320	0	1/82	3/82	4
Warrior Asphalt Co.	Holt, Ala.	5,500	2,000	1984	1984	30
Wickett Refining Co.	Wickett, Texas	8,000	0	1/76	2/82	25+
Total		1,135,014	951,200	—	—	—
District 4						
Caribou-Four Corners Inc.	Woods Cross, Utah	8,400	8,200	1984	1984	21
C & H Refinery Inc.	Lusk, Wyo.	180	0	1/81	2/82	25+
Glacier Park Co.	Osage, Wyo.	10,000	0	2/81	3/82	4
Glenrock Refinery Inc.	Glenrock, Wyo.	6,000	0	4/81	9/81	5
Husky Oil Co.	Cody, Wyo.	11,500	17,800	6/82	9/82	25+
Sage Creek Refining Co.	Cowley, Wyo.	1,000	0	1/82	6/82	17
Silver Eagle Oil Inc.	La Barge, Wyo.	1,500	0	10/82	8/83	9
Southwestern Refining Co.	La Barge, Wyo.	1,040	0	4/81	8/81	7
Texaco Inc.	Casper, Wyo.	21,000	35,500	3/82	7/82	25+
Total		60,600	61,500	—	—	—
District 5						
Arizona Fuels Corp.	Fredonia, Ariz.	6,000	0	2/83	9/83	11
Demmon-Kerdoon	Compton, Calif.	10,000	2,000	1/83	8/83	6
ECO Petroleum Inc.	Long Beach, Calif.	0	7,000	1984	1984	8
Marlex Oil & Refining Co.	Los Angeles, Calif.	21,100	0	1984	1984	7
Powerine Oil Co.	Santa Fe Springs, Calif.	44,120	100,100	1984	1984	34
Quad Refining Corp.	Bakersfield, Calif.	7,000	0	8/80	10/81	2
Road Oil Sales Inc.	Bakersfield, Calif.	6,000	0	1/81	1/82	9
Sabre Oil and Refining Inc.	Bakersfield, Calif.	10,000	0	4/81	11/82	10
Tosco Corp.	Bakersfield, Calif.	38,800	80,000	1984	1984	33
United Independent Oil Co.	Tacoma, Wash.	730	0	7/80	3/82	7
Total		122,650	189,100	—	—	—
U.S. Total		2,430,684	2,534,660	—	—	—

Source: Energy Information Administration, Petroleum Supply Monthly, June 1984 and January 1985.



When one thing separates your fuel from the ground, it better be a PetroGard™ secondary containment system.



Nothing makes secondary containment of underground fuel storage more reliable than the new PetroGard flexible liner system (patent pending) from MPC. It's a puncture and fuel-resistant system made of Hytrel coated* polyester produced by Cooley, Inc. Long used in fuel line hoses, gaskets, automotive boots and other chemical containment systems, a reinforced Hytrel membrane is best for lining excavations and trenches surrounding underground fuel storage tanks.

The complete PetroGard system includes:

- one simple-to-install liner that is truly a second line of defense² in underground storage;
 - a complete trenching system, enclosed with our exclusive InterLok™ sealing device, to protect your underground fuel delivery system right up to your pumps . . . through the piping and connections in which 60% of all your leaks occur;
 - a membrane that is made with Hytrel . . . the toughest material available for underground containment of fuel and other chemicals; and, made to the exact standard of Cooley, Inc. . . . one of the most technologically-advanced suppliers of liners for all type of corrosive liquids.
- When you think about it, there is not a better method for secondary containment than PetroGard.

Hytrel is a product of E.I. DuPont de Nemours & Co., Inc. Membrane manufactured by Cooley, Inc.
PetroGard™ and InterLok™ are trademarks of MPC Containment Systems Ltd.

MPC

MPC Containment Systems, Ltd., 4834 South Oakley, Chicago, IL 60609
Or call, toll-free, 1-800-621-0146. In Illinois, call 312-927-4120.

Association Who, What and Where

American Petroleum Institute

1220 L St., N.W.
Washington, DC 20005
(202) 682-6000
4,000 individual
236 corporate

election Nov.

Officers:

Chair: John F. Baskout, Shell Oil Co., Houston
Pres: Charles J. Dillona
Sr. VP: Stephen P. Potter
VP: Michael E. Caras
VP: Phil G. Goulding
VP: Frank J. Jandowitz
VP: William F. O'Keefe
VP: Charles E. Sandler
VP: C.T. Sawyer
Treas: Theodore A. Butts, Sun Co., Refiner, PA
Sec: Edward E. Hammerbeck

Institute Staff:

Marketing: Gerald A. Schanke
Refining: Ronald L. Jones
Production: B.R. Hall
Transportation: V.K. Leonard
Exploration: Steve Chamberlain
Public Relations: H.H. Hardy
Editorial/Special Issues: Richard Frylund
Environmental Affairs: G.T. Patton
Finance & Accounting: R.H. Stewart
News/Biological Sciences: N.K. Weaver
Policy Analysis: L.G. Blower
Statistics: Edward H. Murphy
Measurement Coord.: J.K. Walters
Abstracting/Indexing: E.H. Brenner
External Liaison: D.A. Scott
State Relations: Truman Hunt
Federal Agencies: A.B. Moore
Federal Agencies: C.E. Sandler
Syn. Fuels: Bruce Petersen
General Counsel: Stark Richie

Marketing Staff:

Dir: Gerald A. Schanke
ASTM: Earl A. Thompson
Pumps & Lubricants: Albert L. Modiano
Marketing Affairs: Kathleen Kerley
Operations & Engineering: Rudy C. White, Todd G. Schwendeman, Bruce Bauman

Marketing Committee Chairmen:

General: Marion M. Smith, Chevron U.S.A. Inc., San Francisco, CA
Marketing Affairs: G.H. Babikian, Atlantic Richfield Co., Los Angeles, CA
Pumps & Lubricants: R.W. Garey, Calumet Refining Co., Chicago, IL
Operations & Engineering: M.L. Dimond, Tawaco U.S.A., Houston, TX

Petroleum Marketers Assn. of America

1120 Vermont Ave., N.W., Suite 1130
Washington, DC 20005
(202) 331-1120
42 member assns.
Pres: David T. Robinson, Robinson Oil, Garden City, KS
Exec. VP: Philip R. Chasim

SIGMA

Society of Independent Gasoline Marketers of America
1730 K. Street N.W., Suite 907
Washington, DC 20006
(202) 429-9333
290 members
election Nov.
Pres: Michael S. Kirschner, Kirschner Brothers Oil Co., Haverford, PA
Exec. Dir: Kenneth A. Doyle

Petroleum Equipment Institute

P.O. Box 2380
Tulsa, OK 74201
(918) 743-9941
1,050 members
election Aug.
Pres: Leland M. Freeman, SE&M Inc., Victoria, TX
Exec. VP: Howard Upton

Petroleum Marketing Education Foundation

101 North Alfred Street
Alexandria, VA 22314
(703) 684-0000
1,500 members
election Jan.
Pres: William G. Lyden Jr., Lyden Oil Co., Youngstown, OH
Exec. VP: Michael T. Scanlon Jr.

REGIONAL

Alabama Oilmen's Assn.
401 Interstate Park Drive
Montgomery, AL 36109
(205) 277-0786
500 members
election June
Pres: Don Morris, Morris Oil Co., Gadsden, AL
Exec. VP: Stephen A. Dickson

Arizona Petroleum Marketers Assn.
P.O. Box 26905
Phoenix, AZ 85068
(602) 942-9173
150 members
election July
Pres: William Woodroffe, Kaibab Industries, Phoenix, AZ
Exec. VP: Andy Pala

Arkansas Oil Marketers Assn.
P.O. Box 229
Little Rock, AR 72203
(501) 374-6293
170 members
election June
Pres: F.L. Robertson, Robertson Oil Co., Fayetteville, AR
Exec. VP: Bob "Sody" Arnold

California Independent Oil Marketers Assn.
555 Capitol Mall, Suite 655
Sacramento, CA 95814
(916) 441-5166
528 members
election Nov.
Pres: Ron Ahlport, R.V. Ahlport Inc., Watsonville, CA
Exec. VP: James F. Divine

Colorado-Wyoming-New Mexico Petroleum Marketers Assn.
4465 Kipling St., Suite 104
Wheat Ridge, CO 80033
(303) 422-7805
350 members
Pres: Colorado—Don Morrison, D-J Petroleum, Limon, CO; Wyoming—Joe Deromedis, Deromedis Oil Co., Cokeville, WY; New Mexico—Mike Steeie, Rio Grande Oil Co., Albuquerque, NM
Exec. VP: Roy Turner

Empire State Petroleum Assn.
8 Westchester Plaza—Executive Park
Elmsford, NY 10523
(914) 592-8810
Pres: William F. Huberle, Hub-Langie Fuel Co., Rochester, NY
Exec. VP: Robert D. Lynch

Florida Petroleum Marketers Assn.
208 Office Plaza
Tallahassee, FL 32301
(904) 877-5178
230 members
election Aug.
Pres: Bill Lank Jr., Lank-Como Oil Co., Ft. Lauderdale, FL
Exec. VP: L. Carl Adams

Fuel Merchants Assn. of New Jersey
66 Morris Avenue
Springfield, NJ 07081
(201) 379-1100
430 members
election May
Pres: Craig Allen, Central Jersey Oil Co., Lakewood, NJ
Exec. VP: Fred J. Sacco

Georgia Oilmen's Assn.
3300 NE Expressway, Suite 8P
Atlanta, GA 30341
(404) 451-5916
455 members
election Oct.
Chmn: William Oglesby, Oglesby Oil Co., Athens, GA
Pres: Roger T. Lane

Idaho Intermountain Oil Marketers (See Intermountain Oil Marketers Assn.)

Illinois Petroleum Marketers Assn.
112 West Cook St.
P.O. Box 1508
Springfield, IL 62705
(217) 544-4609
700 members
election March
Pres: Thomas O. Plunkett, Burnex Oil Co., Cicero, IL
Exec. VP: William R. Deutsch

Independent Oil Men's Assn. of New England
25 Sea Breeze Lane
New Castle, NH 03854
(603) 436-8424
50 members
election fall
Chmn: Steven Shaer, Mutual Oil Co., Brockton, MA
Pres: Wilfred H. Hall

Independent Connecticut Petroleum Assn.
621 Farmington Ave.
Hartford, CT 06105
(203) 236-0851
305 members
election June
Pres: John Cuneen, Danielson Oil Co., Danielson, CT
Exec. VP: Charles S. Isenberg

Indiana Oil Marketers Assn.
8780 Purdue Road
Indianapolis, IN 46268
(317) 875-9057
343 members
election Oct.
Pres: Richard L. Johnson, Johnson Oil Co., Columbus, IN
Exec. VP: L. Jack Stough

Inland Empire Chapter (IOMA) (See Intermountain Oil Marketers Assn.)

Intermountain Oil Marketers Assn.
1800 S. West Temple #300
Salt Lake City, UT 84115
(801) 484-8719
525 members
election July
Pres: Max A. Eggertsen, Maetex Supply, Provo, UT
Exec. VP: Gerald Tedrow

Iowa Petroleum Marketers of Iowa
321 E. 6th Street
P.O. Box 6156
Des Moines, IA 50309
(515) 244-6273
1,172 members
election Feb.
Pres: Dave Joyce, Super Oil, Keokuk, IA
Man. Dir: E. A. Kistenmacher

Kansas Oil Marketers Assn.
804 Merchants National Bank
Topeka, KS 66612
(913) 233-9655
279 members
election March
Pres: Harold Taylor, Taylor Oil Co., Wellsville, KS
Exec. Dir: Charles H. Nicolay

Kentucky Petroleum Marketers Assn.
612-A Shelby Street
Frankfort, KY 40601
(512) 875-3742
100 members
election March
Pres: C. Lee Anderson, Denton Service Co., Denton, KY
Exec. Dir: Thomas H. Maxedon

Louisiana Oil Marketers Assn.
P.O. Box 1
Shreveport, LA 71161
(318) 221-4113
376 members
election July
Pres: Scriven Taylor, Citgo, Natchitoches, LA
Exec. Dir: Robert K. Butcher

Maine Oil Dealers Assn.
P.O. Box 536
Yarmouth, ME 04096
(207) 846-5113
300 members
election June
Chmn: James G. Carey, Carey's Fuel Co., Rumford, ME

Michigan Petroleum Assn.
1200 Michigan National Tower
Lansing, MI 48933
(517) 487-9139
325 members
election April
Pres: James Butler, Mid-States Petroleum Inc., Troy, MI
Exec. VP: Thomas Coriell

Mid-Atlantic Petroleum Distributors Assn.
198 Thomas Johnson Drive,
Suite 110
Frederick, MD 21701
(301) 694-0808
250 members
election sept.
Pres: Caleb Ewing Jr., Ewing Oil Co.
Exec. VP: Robert Irvin

Midwest Petroleum Assn.
10400 Higgins Road, Suite 126
Rosemont, IL 60018
(312) 298-5370
275 members
election June
Pres: Ernst Shafer, Smith Shafer Oil Co., Rockford, IL
Exec. VP: Donald E. Woodrick

Mississippi Petroleum Marketers Assn.
P.O. Box 257
Jackson, MS 39205
(601) 353-1624
300 members
election June
Pres: Dan Waring, Waring Oil Co., Vicksburg, MS
Exec. Dir: Marshall Lusk

Missouri Oil Jobbers Assn.
238 E. High St., Suite 3A
Jefferson City, MO 65101
(314) 635-7117
400 members
election Feb.
Pres: Gary C. Brown, D.S. Caldwell Oil Co., Richland, MO
Exec. VP: John R. Hahn

Montana Intermountain Oil Marketers (See Intermountain Oil Marketers Assn.)

Nebraska Petroleum Marketers
1320 Lincoln Mall
Lincoln, NE 68508
(402) 474-6691
407 members
election March
Pres: Rex Ekwall, Rite Way Oil & Gas Co., Omaha, NE
Exec. VP: George L. Walters

Nevada Chapter (IOMA) (See Intermountain Oil Marketers Assn.)

New Mexico Petroleum Marketers Assn. (See Colorado-Wyoming-New Mexico Petroleum Marketers Assn.)

Partners for Perfection

IBM's remarkable computer plus software from PSS™ a winning combination.



Now you can take full advantage of the dramatic capabilities of the IBM 16 bit microcomputer.

A broad range of programs, designed by Petroleum Software & Systems, is now available for use by petroleum marketers on IBM computers, including the IBM "PC", the Personal Computer with color screens.

Among the systems available are:

- Service station management.
- Liquid and Package product inventories.
- Order entry, invoicing, warehouses.

- Autofuel™ card lock billing systems.
- Complete Financial Accounting packages.
- Wide range of systems available — single or multiple displays.
- Motor Oil/Lubricants Distributor Accounting.
- Wholesale Bulk Plant/Terminal Automation.
- Taxes — Excise and Sales tax reporting.

For the facts on the total package — software and hardware — call toll-free 800/257-5113. We'll be happy to arrange a demonstration or forward additional

PSS™

PETROLEUM SOFTWARE
& SYSTEMS, INC.

800/257-5113
800/921-6700

Princeton, New Jersey
Mountain View, CA
Toronto, Canada

North Carolina Petroleum Marketers Assn.

P.O. Box 30519
Raleigh, NC 27622
(919) 782-4411
750 members election Oct.
Pres: Larry Jordan, L.G. Jordan Oil Co., Apex, NC
Exec. VP: Don M. Ward

Northwest Petroleum Assn.

2345 Rice Street, Suite 173
St. Paul, MN 55113
(612) 484-7227
600 members election March
Pres: Fred Curtis, Curtis Oil, Duluth, MN
Exec. Dir: Bob Krogman

Ohio Petroleum Marketers Assn.

50 West Broad Street, Suite 1130
Columbus, OH 43215
(614) 224-0271
500 members election April
Pres: Don Lykins, Lykins Oil Co., Milford, OH
Exec. VP: Roger F. Dreyer

Oil Jobbers of Wisconsin

1220 Fernite Drive
Madison, WI 53716
(608) 221-4771
500 members election April
Pres: Arlen Rusch, Wausau, WI
Exec. VP: Raymond G. Karnes

Oklahoma Oil Marketers Assn.

5115 N. Western Ave.
Oklahoma City, OK 73118
(405) 842-6625
450 members election May
Pres: Paul Welch, Welch Oil Co., Wichita Falls, TX
Exec. VP: Charles V. Stuckey

Oregon Petroleum Marketers Assn.

3130 S.W. Ridgewood Road
Portland, OR 97225
(503) 292-2700
112 members election Nov.
Pres: Robert L. Newburn, Pacific Petroleum Corp., Eugene, OR
Exec. VP: Bob Kupfer

Pacific Oil Conference

555 Capitol Mall, Suite 555
Sacramento, CA 95814
(916) 446-1312
865 members election Sept.
Gen. Chmn: Robert F. Rinehart, Rinehart Oil Inc., Ukiah, CA
Exec. Dir: James F. Divine

Pennsylvania Petroleum Assn.

#2 Shore Drive Center, Suite 121
2001 N. Front St.
Harrisburg, PA 17102
(717) 233-5838
707 members election fall
Pres: Alan R. Guttman, Guttman Oil Co., Belle Vernon, PA
Exec. VP: John P. Zinkand

South Carolina Oil Jobbers Assn.

1809 Goddard
P.O. Box 64
Columbia, SC 29202
(803) 765-9570
280 members election Dec.
Pres: Bill Bird, Bird Oil Co., Hilton Head Island, SC
Exec. Dir: Dick deMontmolin
Asst. Exec. Dir: David W. Reed

South Dakota Petroleum Marketers Assn.

Box 1058
Pierre, SD 57501
(605) 224-8606
election Sept.
Pres: Rudy Gerstner, Gerstner Oil Co., Yankton, SD
Exec. VP: Curt Neuhaath

Tennessee Oil Marketers Assn.

430 Enos Reed Drive
P.O. Box 23256
Nashville, TN 37202
(615) 242-4377
election Nov.
Pres: David Adcox, The Highland Corp., Hohenwald, TN
Exec. Dir: Elizabeth Walker

Texas Oil Marketers Assn.

701 W. 15th Street
Austin, TX 78701
(512) 476-9547
1,000 members election April
Pres: Jerdy Gary, Sooner Oil, Denison, TX
Exec. Dir: Dave Fellers

Utah Chapter (IOMA)

(See Intermountain Oil Marketers Assn.)

Virginia Petroleum Jobbers Assn.

P.O. Box 6344
Richmond, VA 23230
(804) 282-7534
212 members election Oct.
Pres: Terry M. Phelps, Whiting Oil Co., Roanoke, VA
Exec. VP: E. D. Catterton

Washington Oil Marketers Assn.

400 Dexter Ave. N.
Seattle, WA 98109
(206) 623-8733
75 members election Dec.
Pres: Doug True, Gulf Industries, Seattle, WA
Exec. VP: C. Ed Bishop

West Virginia Petroleum Marketers Assn.

Atlas Building, Suite 806
Charleston, WV 25301
(304) 343-5885
90 members election Sept.
Pres: Ralph C. Hess Jr., Hess Oil Co., Elkins, WV
Exec. Dir: David W. Haines

Wyoming Petroleum Marketers Assn.

(See Colorado-Wyoming-New Mexico Marketers Assn.)

PRIVATE BRAND

Independent Gasoline Marketers Council

1133 15th Street N.W.
Washington, D.C. 20005
(202) 857-0220
17 members
Exec. VP: Jack A. Blum

Kentucky Independent Gasoline Marketers Assn.

3906 Dupont Sq. So.
Louisville, KY 40207
(502) 897-7167
60 members election March
Pres: Kenneth H. Stephens, Ken Stephens Oil Co., Louisville, KY
Exec. Dir: Jesse F. Simpson

Serve Yourself & Multiple Pump Assn.

3960 Wilshire Blvd., Ste. 401-A
Los Angeles, CA 90010
(213) 387-3114
Pres: Gary L. Webb, Pronto Oil Co., Bell Gardens, CA
Exec. Dir.: Paul T. Erdos

Southeastern Independent Oil Marketers Assn.

6045 Barfield Road N.E., Suite 104
Atlanta, GA 30328
(404) 256-5541
502 members election June
Pres: Millard Young, National Refining, Birmingham, AL
Exec. VP: Ivan Maple

Texas Independent Producers & Royalty Owners Assn.

1910 InterFirst Tower
Austin, TX 78701
(512) 477-4452
5,400 members election June
Pres: Bruce Anderson, Anderson Oil Corp., Houston, TX
Exec. VP: Julian G. Martin

EQUIPMENT

Equipment & Tool Institute

1545 Waukegan Rd.
Glenview, IL 60025
(312) 729-8550
65 members election Nov.
Exec. Mgr.: Donn R. Proven

International Carwash Assn./National Carwash Council

4415 Harrison St., Suite 200
Hillside, IL 60162
(312) 449-7430
2,500 members election June
Exec. Dir: R. R. Trantham

National Conference on Weights and Measures

P.O. Box 3137
Gaithersburg, MD 20832
(301) 921-3677
1,500 members election July
Pres: Ernest Ambler, National Bureau of Standards
Exec. Sec: Albert Tholen

The Packaging Institute, U.S.A.

20 Summer Street
Stamford, CT 06901
(203) 325-9010
3,000 members election June
Pres: Steve Resina, Resina Automatic Machinery Co., Brooklyn, NY
Exec. Dir: Carol M. Boyle

Steel Tank Institute

666 Dundee Rd., Suite 705
Northbrook, IL 60062
(312) 498-1980
30 members election March
Pres: J. D. Stidham, Chicago Boiler Co., Chicago, IL
Exec. VP: Brian C. Donovan

Truck Trailer Manufacturers Assn.

1020 Princess Street
Alexandria, VA 22314
(703) 549-3010
200 members election May
Pres: Charles J. Calvin

FUEL OIL

Better Home Heat Council

118 Cedar Street
Wellesley Hills, MA 02181
(617) 237-0730
250 members election Sept.
Pres.: Jeffrey W. Raynes

Better Home Heat Council of New Hampshire

25 Sea Breeze Lane
New Castle, NH 03854
(603) 436-8424
50 members election Sept.
Chmn: David Duston, Duston Fuel, Hampstead, NH
Pres.: Wilfred H. Hall

Independent Heating Oil Dealers Assn.

446 Powers Bldg.
16 West Main
Rochester, NY 14614
(716) 546-8288
19 members election June
Pres: Samuel Costanza
Exec. VP: Gary Frati

National Assn. of Oil Heat Service Managers

P.O. Box 380
Elmwood Park, NJ 07407
(201) 796-1821
Exec. VP: Charles W. Parلمان

New England Fuel Institute

20 Summer Street (Box 886)
Watertown, MA 02272
(617) 924-1000
1,034 members election April
Pres: Charles H. Burkhart

New York Oil Heating Assn.

225 W. 34th St., Room 1202
New York, NY 10122
(212) 695-1380
200 members election June
Pres: Joseph Losquadro, Vijax Fuel, Brooklyn, NY
Exec. VP: James R. Wells

Oil Fuel Institute of Florida

P.O. Box 7729
Orlando, FL 32854
(305) 843-1198
40 members election summer
Pres: Freeman Register, Register Oil & Gas, Starke, FL
Exec. VP: Mark V. Barker Jr.

Oil Heat Institute

5 Franklin Rd., P.O. Box 18
East Greenwich, RI 02818
(401) 885-1301 or (800) 662-5004 toll-free in Rhode Island
98 members election May
Pres: Peter Lombardi Jr., Hy-Test Oil, Johnston, RI
Exec. Dir: J. Howard King

Oil Heat Institute of Long Island

601 Veterans Memorial Highway
Hauppauge, NY 11788
(516) 360-0200
200 members election Jan.
Pres: Eugene L. Gazza, HUFCO, Huntington, NY
Exec. VP: Kevin M. Rooney

Oil Heat Institute of Oregon

P.O. Box 42227
Portland, OR 97242
(503) 231-4850
151 members election Sept.
Pres: James H. Coon, Diamond Fuel
Exec. VP: Gregory M. Stewart

Oil Heat Institute

P.O. Box 172
Boise, ID 83701
(208) 344-1152
38 members election Jan. 1987
Pres: Bob Nicholes, EONICO, Caldwell, ID
Exec. VP: Frank Sattler

Oil Heat Institute of Washington

400 Dexter Avenue N.
Seattle, WA 98109
(206) 623-8730
225 members election June 1986
Pres: C. Ben Calry, Pacific Heating Oil Co., Seattle, WA
Exec. VP: C. Edward Bishop

Oil Heat Institute of Upstate New York

100 White Spruce Blvd.
Rochester, NY 14623
(716) 427-2233
45 members election Dec.
Pres: George Wilson, Rogers Fuel, Rochester, NY
Exec. VP: Mara Hynes

LP-GAS

National LP-Gas Assn.

1301 W. 22nd St.
Oak Brook, IL 60521
(312) 986-4800
3,800 members election June
Pres: J. Charles Sawyer, Sawyer Gas Co. of Jacksonville, Jacksonville, FL
Exec. VP: J. D. Capps

LUBRICATION

American Society of Lubrication Engineers

838 Busse Highway
Park Ridge, IL 60068
(312) 825-5536
3,700 members election May
Pres: Carleton N. Rowe, Mobile Research and Development Corp., Paulsboro, NJ

Assn. of Petroleum Re-Refiners

600 Water St. S.W.
Washington, DC 20024
(202) 488-8870
100 members election fall
Pres: George T. Booth III, Booth Oil Co., Buffalo, NY
Exec. Dir: James A. McBain Jr.

Independent Lubricant Manufacturers Assn.

1055 Thomas Jefferson St. N.W., Suite 302
Washington, D.C. 20007
(202) 337-3470
230 members election Oct.
Pres: H. Prescott Bagley II, The White & Bagley Co., Worcester, MA
Exec. VP: Nancy DeMarco

National Lubricating Grease Institute

4635 Wyandotte Street
Kansas City, MO 64112
(816) 931-9480
election Oct.
Pres: Robert W. Johnston, Southwest Petrochem Div., Wilco Chemical Co., Olathe, KS
Gen. Mgr: Edward J. Palecki

Scully Faylsafe® Overfill Prevention Systems
The safest, most reliable systems made
It's that simple.

Scully Has It All

**For Storage Tanks,
Trucks, and Racks**

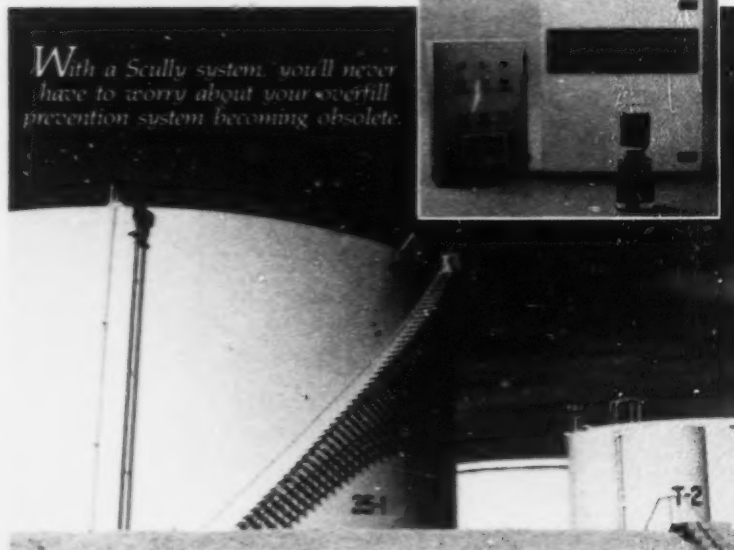
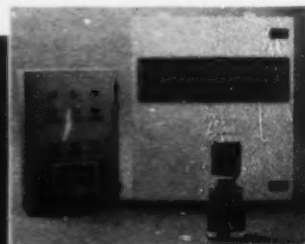
Our Tank Farm Systems are designed to fit any configuration. These systems include portable units, fixed high and low level alarm systems and the Scully Dynanet™ ST-24A, capable of remote control and communication with information systems.

Scully's Tank Truck Systems consist of a complete range of sensors and control monitors. They include thermistor and optic systems, and the On-Board Load Anywhere®—Go Anywhere® system.

Our Loading Rack Control Systems meet your every need, from control monitors, to plug and socket connectors. We also provide a full line of accessories that allow you to upgrade and expand.

Like the continuous pulsing of the life-monitoring electrocardiogram signal, the Scully Dynamic Self-Check® circuit continuously monitors the health of your overfill system.

With a Scully system, you'll never have to worry about your overfill prevention system becoming obsolete.



With a Scully System on the job, maximum safety, compatibility and reliability are facts... not fiction! Why settle for anything less?



The Scully Advantages:

- Total Systems that adjust to your needs
- Nationwide Service Support
- Immediate Availability
- Maximum safety with continuous Dynamic Self-Testing®
- Ultimate in industry-proven reliability
- Simplest, lowest cost installation

scully

For more information on the right system for your requirements, contact:

Scully Electronic Systems, Inc.
70 Industrial Way
Wilmington, MA 01887 USA
(617) 729-7510, Telex 94-7437

Toll free technical assistance 1-800-225-0902

RETAIL

National Assn. of Truck Stop Operators

1199 N. Fairfax Street, Suite 801
Alexandria, VA 22314
(703) 549-2100
1,000 members election Summer
Chmn: Gene Lindley, State Line
Truck Stop, New Paris, OH
Pres: Ronald L. Ziegler

Service Station Dealers of America

400 N. Capitol St. N.W., Suite 175
Washington, D.C. 20001
(202) 393-8868
54 affiliated associations
election Aug.
Pres: Tracy L. Stanton, Tracy's Shell
Center, Bexley, OH
Exec. Dir: Vic Rasheed

Asn. of Retail Marketing Services

412 Ocean Ave.
Sea Bright, NJ 07760
(201) 842-5070
300 members election Dec.
Pres: William Karstens, Affiliated
Mercantile, Amarillo, TX
Exec. VP: Harry Fellbaum Jr.

TBA/CAR
SERVICE**Automotive Exhaust Systems Manufacturers Council**

222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
5 members election Jan.
Chmn: E. J. Svoboda, Midas-
International Corp.
Exec. Dir: Ralph W. Van Demark

Automotive Information Council

29200 Southfield Road, Suite 111
Southfield, MI 48076
(313) 559-5922
625 members election April

Automotive Market Research Council

222 Cedar Lane
Teaneck, NJ 07666
(419) 259-3005
387 members election March
Pres: Karl G. Motter Jr., AP Parts,
Toledo, OH
VP: Terrance P. Winslow, Champion
Spark Plug, Toledo, OH

Automotive Parts & Accessories Assn.

5100 Forbes Boulevard
Lanham, MD 20706
(301) 459-9110
1,500 members
Pres: Julian C. Morris
Exec. Dir: Liliane Vasseur

Automotive Parts Mfrs. Assn. of Canada

55 York St., Suite 402
Toronto, Ontario, Canada M5J 1R7
(416) 368-9673
350 members election April
Pres: P. J. Lavelle

Automotive Service Industry Assn.

444 N. Michigan Avenue
Chicago, IL 60611-3975
(312) 836-1300
8,500 members election Feb.
Chmn: Robert H. Chilton Jr., The
Chilton Companies, Nashville, TN
Pres: John W. Nerlinger

Automotive Warehouse Distributors Assn.

9140 Wark Parkway
Kansas City, MO 64114
(816) 444-3500
828 members election Aug.
Pres: Martin Fromm
Exec. VP: Louis A. Zuanich

Battery Council International

111 East Wacker Drive
Chicago, IL 60601
(312) 644-6610
315 members election April
Pres: Ed Taylor, Daniell Battery,
Baton Rouge, LA
Exec. Sec: William W. Carpenter

Brake System Parts Manufacturers Assn.

222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
20 members election Feb.
Chmn: James MacGillivray, Brake
Parts Co., Div. of Echlin
Exec. Dir: Ralph W. Van Demark

Independent Battery Manufacturers Assn.

100 Larchwood Drive
Largo, FL 33540
(813) 586-1409
291 members
Chmn: Richard B. Bowers, East
Penn Mfg. Co., Lyon Stations, PA

International Oil Industry TBA Group

Robert L. Myrick
P.O. Box 2483
Houston, TX 77001
(713) 241-2926
300 members election Oct.
Chmn: L. J. Vielhaber, Cooper Tire &
Rubber Co., Findlay, OH

Motor & Equipment Manufacturers Assn.

222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
750 members election Dec.
Chmn: Ronald B. Hermann, General
Automotive Specialty Co., New
Brunswick, NJ
Pres: William A. Raftery

National Automotive Parts Assn.

2999 Circle 75 Parkway
Atlanta, GA 30339
(404) 956-2200
Pres: Bob McKenna

National Automotive Radiator Service Assn.

P.O. Box 267
Harleysville, PA 19438
(215) 256-4246
1,100 members election March
Pres: Dennis Irving, City Radiator
Service, Everett, WA
Exec. VP: Charles Eldridge

National Tire Dealers & Retreaders Assn.

1250 I Street N.W., #400
Washington, DC 20005
(202) 789-2300
5,000 members election Sept.
Pres: Harold L. Coker, Coker Tire Co.,
Chattanooga, TN
Exec. VP: Phillip P. Friedlander Jr.

Tune-Up Manufacturers Institute

222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
17 members election Jan.
Pres: F. David Trickey, TRW Inc. Re-
placement Parts
Exec. Dir: Ralph W. Van Demark

TRUCKING

American Trucking Assn.

2200 Mill Road
Alexandria, VA 22314
(703) 838-1700
election Oct.
Chmn: Dale K. Craig, Craig Trans-
portation Co., Perrysburg, OH
Pres: Thomas J. Donohue

National Tank Truck Carriers

2200 Mill Road
Alexandria, VA 22314
(703) 838-1960

Private Truck Council of America

2202 P Street N.W.
Washington, DC 20036
(202) 785-4900

OTHERS

American Automobile Assn.

8111 Gatehouse Rd.
Falls Church, VA 22047
(703) 222-6334
25-million members election April
Pres: James B. Creal
Man. Dir., Public Affairs: Richard F.
Hebert

American Independent Refiners Assn.

114 3rd Street, S.E.
Washington, D.C. 20003
(202) 543-8811
35 members
Pres: Ed Schroeder, Laketon Refin-
ery, Laketon, TN
Exec. Dir: Ray F. Bragg Jr.

American Petroleum Credit Assn.

City Place, Suite 600
730 Hennepin Ave. S.
Minneapolis, MN 55403
(612) 338-7331
400 members election Oct.
Pres: Carl H. Hines, Gulf Oil Products
Co.
Exec. Sec.: Donald R. Mosher

American Society for Testing & Materials

1916 Race St.
Philadelphia, PA 19103
(215) 299-5400
29,000 members election Jan.
Chmn: Paul L. Strigner, Nat'l.
Research Council of Canada Fuels &
Lubricants Div.

Asn. of Oil Pipe Lines

1725 K St., N.W., Suite 1205
Washington, DC 20006
(202) 331-8228

Canadian Petroleum Assn.

1500, 633—8th Ave., S.W.
Calgary, Alberta, Canada T2P 2Y5
(403) 269-6721
165 members election March
Exec. Dir: Ian R. Smyth

Highway Users Federation

1776 Massachusetts Ave., NW
Washington, DC 20036
(202) 857-1200
450 corp. assoc. members
election Nov.
Pres: John A. Clements
Exec. VP: Carlton Robinson

Independent Fuel Terminal Operators Assn.

1250 Connecticut Ave N.W.
Suite 800
Washington, DC 20036
(202) 637-9060
16 members election Oct.
Pres: L. P. Steuart II, Steuart
Petroleum Co., Washington, DC
Gen. Council: John H. Zentay

Independent Liquid Terminals Assn.

1133 15th St. N.W., Suite 204
Washington, DC 20005
(202) 659-2301
election Nov.
Pres: John Prokop
Dir. of Admin: E. Bruce Calvert

Independent Petroleum Assn. of America

1101 16th St. N.W.
Washington, DC 20036
(202) 857-4700
9,500 members election Fall
Chmn: Jon Rex Jones, Jones
Exploration, Houston, TX
Exec. VP: Lloyd Unsell

Mid-Continent Oil & Gas Assn.

711 Adams Office Bldg.
Tulsa, OK 74103
(918) 582-5166
7,600 members election Feb.
Pres: Wayne Gibbens, 1800 K St.,
N.W., Washington, DC 20006

National Assn. of Convenience Stores

Three Skyline Place
5201 Leesburg Pike, Suite 809
Falls Church, VA 22041
(703) 578-1800
1700 members
Pres: Kerley Leboeuf

National Petroleum Council

1625 K St., N.W.
Washington, DC 20006
(202) 393-6100
Exec. Dir: Marshall W. Nichols

National Fire Protection Assn.

Batterymarch Park
Quincy, MA 02269
(617) 770-3000
32,500 members election May
Pres: Robert W. Grant
VP: Anthony R. O'Neill

National Petroleum Refiners Assn.

1899 L St., N.W., Suite 1000
Washington, DC 20036
(202) 457-0480
300 members election March
Chmn: Mac Jordan, Kerr-McGee
Refining Corp., Oklahoma City, OK
Pres: Urvan Sternfels

National Assn. of Tax Administrators

444 North Capitol Street, N.W.
Suite 334
Washington, DC 20001
(202) 624-5890
50 states election June
Pres: Richard Nivens, California
State Board of Equalization,
Arcadia, CA
Exec. Sec: Leon Rothenberg

Recreation Vehicle Industry Assn.

1896 Preston White Drive
P.O. Box 2999
Reston, VA 22090
(703) 620-6003
526 members election Sept.
Pres/Gen. Council: David J.
Humphries

Society of Automotive Engineers

400 Commonwealth Drive
Warrendale, PA 15096
(412) 776-4841
43,000 members election Feb.
Pres: Elliott A. Green, Lockheed-
California Co., Burbank, CA
Exec. VP: Joseph Gilbert

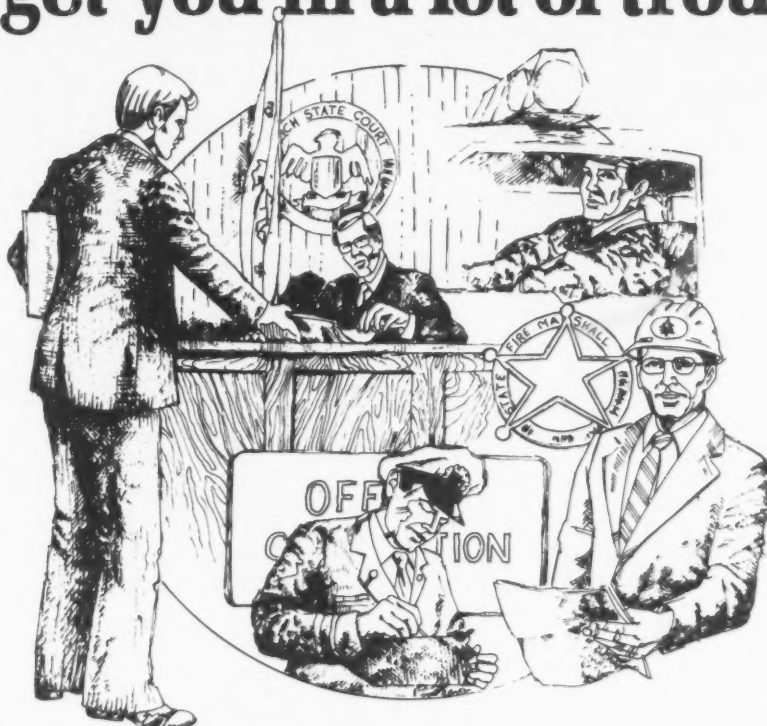
Western Oil and Gas Assn.

727 W. 7th Street, Suite 850
Los Angeles, CA 90017
(213) 627-4866
100 members election Dec.
Pres: Darrell G. Warner, Exxon
Company, USA
Exec. VP: Arthur O. Spaulding

■ **Attention Association Executives:**
If your association is not currently listed,
and you want to be included in the 1986
edition of the *Factbook*, write to:
Factbook Editor/Association Listing, 950
Lee Street, Des Plaines, IL 60016

Marketers, don't risk losing gasoline—and more!

**With leaky fuel tanks,
a false sense of security
can get you in a lot of trouble.**



We developed "The Union 76 Tank Leak Detection Program."

It's a simple, step-by-step program that determines if a leak exists, where it is and how best to repair it. There's also a method for determining the probable condition of non-leaking tanks. It's a sound, complete program for resolving tank leaks—and it's another advantage that Union Oil marketers have.

Safe, non-leaking fuel tanks are important to both you and your community. So be certain that yours are in good condition.

Because tank leaks are something you don't want to risk.

For more information, call or write: A. D. (Buck) Littlejohn, Union Oil Company of California, 1650 E. Golf Road, Schaumburg, Illinois 60196: (312) 885-5521.

Go with the spirit. The Spirit of 76.

Available east of the Rockies only.

UNION 76

Marketing Management Personnel

■ ACME RETAIL INC.
dba Handy Pantry Food Stores
P.O. Box 2359
Gastonia, NC 28053-2359
(704) 867-2336
Key: M. Gr.
F. C. Roberts Jr., Chmn.
Larry Bryant, Pres.
Gary Bilings, VP Planning & Dev.

■ ADA RESOURCES
Div. of Adams Resources & Energy, Inc.
P.O. Box 844
Houston, TX 77001
(713) 797-9966
Key: T. M. G. D. L.
Subs: Buddy's Stores, Kirbyville Marketing Co.
K. S. Adams, Jr., Chmn.
R. S. Shepherd, Pres.
E. H. Laws, Exec. VP
J. L. Parks, Mgr. Whlsl. Sis.
Lee Beauchamp, Mgr. Products & Pricing
Allan Koerth, Mktg. Acct. Mgr.
David Clark, Credit Mgr.

■ AERO OIL CO.
230 Lincolnway East
New Oxford, PA 17350
(717) 624-4311
Key: M. G. F. D. L.
Sub. of Phillips Petroleum Co.
N. T. Washburn, Pres.
V. T. Ward, VP
E. G. Higginbotham, VP
C. F. Kaiser, Sec. Treas.
T. T. Washburn, Opls. Svcs. Group Mgr.

■ AGWAY PETROLEUM CORP.
P.O. Box 4852
Syracuse, NY 13221
(315) 477-6478
Key: T-Phillips, M-Phillips; G. D. F. L.
Sub. of Agway Inc.
Sub: Texas City Ref., Inc.
Robert J. Kutli, Pres.
Ralph D. Fuller, VP Supply & Purch.
Jack Willard, VP Mktg. & Distrib.
W. F. Meckling, Whlsl. Sis. Mgr.
F. Newton, Dir. of Sis.
K. F. C. Suess, Dir. Mktg.
George Puzey, Mktg. Planning Mgr.
K. M. Williams, Mktg. Comm. Mgr.

New England Region
Joel Newman

Central Region
Robert Berkley

Great Lakes Region
Donald Schalk

Penn. Region
Milt Lend

Atlantic Region
Warren Coleman

■ AMERADA HESS CORP.
1185 Ave. of the Americas
New York, NY 10036
(212) 967-8500
Key: I; G. F. LPGw. L.
Leon Hess, Chmn.
Philip Kramer, Pres. & CEO
H. W. McCollum, Chmn.-Fin. Comm.
Bernard T. Devenin, Exec. VP
R. F. Wright, Exec. VP
A. T. Jacobson, Group VP
Peter A. Dysert, Sr. VP
Neal Gelfand, Sr. VP
Norman Goldberg, Sr. VP
John B. Hess, Sr. VP
W. R. Jameson, Sr. VP
C. H. Norz, Sr. VP
R. K. Stafford, Sr. VP-Fin.
& Controller
Seymour R. Miller, Sr. VP
Nathan K. Trynin, Sr. VP
William R. Zimmerman, Sr. VP
G. A. Jamin, Treas.
A. T. Aitkens, VP
Nicholas D. Bernard, VP
Alan A. Bernstein, VP
M. B. Bianchi, VP
Thomas A. Bowman, VP & Auditor
Arthur R. Broadman, VP
J. F. Cassidy, VP
F. L. Clark, VP
T. A. Collins, VP
J. F. Connors, VP
D. W. Cook, VP
George F. Dewhurst, VP
John J. Duggan, VP
Charles J. Dunn, VP
Joseph R. Enloe Jr., VP
Joseph P. Gehegan, VP
Val M. Hebertson, VP
Louis Horvath, VP
W. T. Howard, VP
John J. Koval, VP
Donald Laing Jr., VP
W. S. H. Laidlaw, VP
Philip J. Mazzilli, VP
Robert McReynolds, VP
Robert P. Powers, VP
Rene L. Sagebien, VP
R. L. Smernoff, VP
John Steed, VP
D. G. Stevenson, VP
L. A. Stricklin, VP
Carl T. Tursi, VP and Sec.
Andrew Zizina, VP
J. B. Collins II, Gen. Council
J. Bramhall, VP
A. J. D'Amico, VP
W. J. Dooley, VP
M. J. Klinger, VP
J. Maher, VP
A. Versacci, VP

■ AMERICAN PETROFINA INC.
P.O. Box 2159
Dallas, TX 75221
(214) 750-2400
Key: I; G. F. D. LPG. Lw
Sub: of Petrofina, S. A. (82%)
Subs: American Petrofina Marketing Inc.
Finaserve, Inc.
Petcon, Inc.
Porto Fina Oil Co.
P. D. Meek, Chmn. & Pres.
J. L. Thomas, Mktg. VP
R. E. Piner, Asst. Mgr., Distrib. Sis., Eastern Area
D. W. Randolph, Asst. Mgr., Distrib. Sis., Western Area
C. V. Dix, Admin. Mgr.
J. L. Rudesell, Gen. Mgr., Lube & TBA
F. N. Cox, Lube Oil Sis. Mgr.
J. R. Solomon, TBA Sis. Mgr.
J. W. Boyd, Gen. Mgr., Mktg. Opls.
J. W. Cahill, Jr., Dir., PR
M. J. Couch, VP Supply & Trans.
C. B. Crow, Jr., Mgr., Prod. Supply
J. D. Howell, Gen. Mgr., Ref. Sis.
B. L. Martin, Mgr., Whlsl. Credit

Western Area
Lubbock, TX District
P.O. Box 3886
R. N. Colter, Mgr.

Dallas, TX District
1186 W. Pioneer Pkwy.
(Arlington, TX)
S. L. Mullins, Mgr.

San Antonio, TX District
8626 Tesoro Drive
L. E. Wright, Mgr.

Sioux Falls, SD District
4200 S. Louise Ave.
J. D. Houk, Mgr.

Eastern Area
Memphis, TN District
3171 Directors Row
W. W. Malphus, Mgr.

Atlanta, GA District
2970 Parrott Ave., N.W.
J. E. Payne, Mgr.

Tampa, FL District
P.O. Box 75265
K. W. Harmon, Mgr.

■ AMOCO CORP.
200 East Randolph Drive
Chicago, Illinois 60601
(312) 856-5111
Key: I; G. F. D. LPGw. L.
Subs: Amoco Oil Co.
Omega Oil Company
L. D. Thomas, Pres.
P. D. Collier, Exec. VP
S. G. Van Sickle, Mktg. VP
J. C. Bergman, Gen. Mgr. Mktg.
T. J. McJonty, Mgr. Mktg. Enterprises
C. W. Robertson, Mgr. Light Oils
J. A. Stitzell, Advser. Mgr.
R. H. Markley, Mgr. Mktg. Plan. & Eval.

■ ANCHOR GASOLINE CORP.
114 E. 5th St.
Tulsa, OK 74103
(918) 584-5291
Key: R, M, O; Gw. Dw
Subs: Canal Refining Co.
Anchor Coal Co.
Cove Petroleum Corp.
Bay Petroleum Corp.
Clear Creek Coal Co., Inc.
Joe R. Wright, Pres.
B. A. Mockley/Exec. VP
E. W. Clopton, VP
C. R. Dupre, VP

■ APEX OIL CO.
7930 Clayton Rd.
Richmond Hts., MO 63117
(314) 889-9600
Key: I; G. F. D. LPG. L
Sub: Clark Oil & Refining Co.
Apex Towing Co.
Goldstein Oil Co.
Novelty Oil Co.
Samuel R. Goldstein, Chmn.
P. A. Novelly, Pres.

■ ARKANSAS VALLEY PETROLEUM
7213 S. Memorial
Tulsa, OK 74133
(918) 252-0508
Key: M; G. D.
Subs: Arkansas Valley Distributing
W. O. Smith, Pres.-CEO
F. H. Sehoeb, Gen. Mgr.

■ ARLEX OIL CORP.
275 Massachusetts Ave.
Lexington, MA 02173
(617) 852-3400
Key: M; Fr
John Maloney, Pres.
Wm. Maloney, VP
David F. Eagle, VP

■ ARMOUR OIL CO.
P.O. Box 85302
San Diego, CA 92138
(619) 291-1000
Key: T; G. F. D. L.
O. B. Armour, Pres.-CEO
L. M. Armour, Exec. VP
H. O. Armour, VP, Mktg.

■ TRUMAN ARNOLD COMPANIES
P.O. Box 973
Texarkana, TX 75501
(214) 836-8591
Key: M; G. D. L.
Subs: Roadrunner
Truman Arnold, CEO
Gil Arnold, Pres.
Larry Fincher, Exec. VP
Johnny Arnold, Gen. Mgr.
Tony Arnold, Dir. of Stores
Jack Thompson, Dir. Pric. & Supply

■ ASAMERA OIL
P.O. Box 118
Denver, CO 80201
(303) 863-7300
Key: R, M; G. F. D. LPG. L.
Will Narva, Pres.
Thomas Wood, Sec. Treas., Controller
Brad Driver, Div. Controller
Robert Humbert, VP Ref.
Thomas Johnson, VP Sup. & Distrib.
Eric Spickelmier, Mgr. Sis.
Don Mullins, Pers. Dir.

■ ASHLAND OIL, INC.
P.O. Box 391
Ashland, KY 41114
(606) 329-3333
Key: I; G. D. F. LPGw. Lw
J. R. Hall, Chmn.-CEO
W. R. Seaton, Vice Chmn., Chief Fin. Officer
R. T. McCowan, Vice Chmn., Ex. Aff.
P. W. Chellgren, Sr. VP and Group Oper. Officer
W. C. Voss, Sr. VP, Group Oper. Officer
C. J. Luellen, Sr. VP, Group Oper. Off., and Pres., Ashland Petro. Co.
R. W. Spence, Sr. VP and Group Oper. Officer

ASHLAND PETROLEUM CO.
P.O. Box 391
Ashland, KY 41114
(606) 329-3333
C. J. Luellen, Pres.
R. E. Yancey Jr., Sr. VP, Manu., Crude Supply and Trans.

Light Products Marketing Group
C. R. Lovorn, VP, Ref. Sis.
J. W. Moren, Mgr. Trans. Fuels
R. L. Fulton, Div. Mgr. Atlanta
J. C. Snyder, Div. Mgr., Baltimore
D. R. Davis, Div. Mgr., Cincinnati
H. T. Thompson, Div. Mgr., Chicago
L. H. Dunbar, Reg. Mgr., Cincinnati
R. C. McGrew, Div. Mgr., St. Paul Park

Retail Marketing Group
R. A. Jensen, VP and Pres. of SuperAmerica Stores Div.
R. C. Ball, Admin. Mgr.
G. K. Townsend, VP, SuperAmerica
J. F. Pettus, VP, SuperAmerica

Supply and Transportation
S. S. Watson, Group VP, Sup. & Trans. Asphalt and Indus. Prod.
R. H. Chatfield Jr., VP, Asphalt Mktg.
J. T. McKee, VP, Sup. & Distrib.
D. J. Spender, VP, Trading

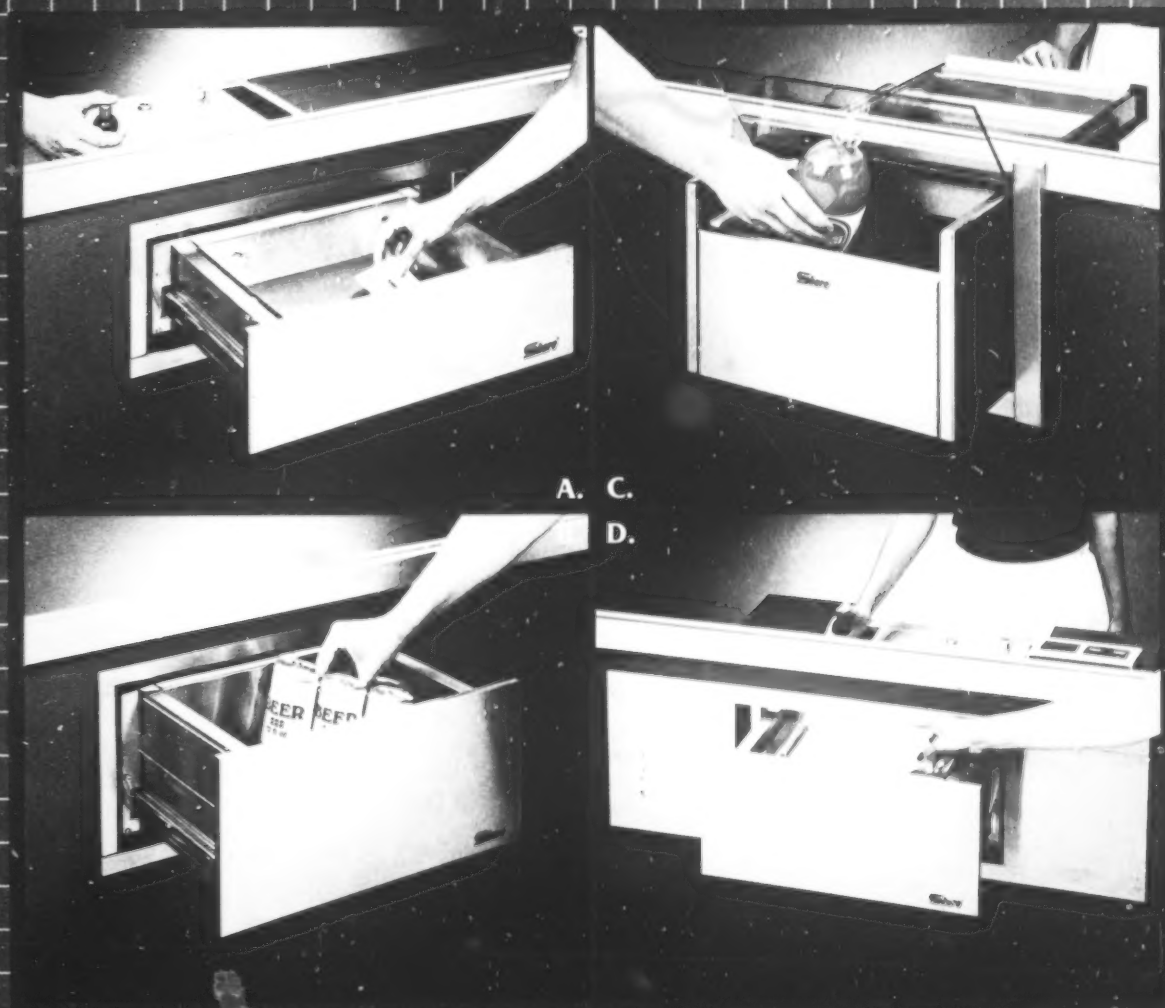
KEY

I..... Integrated
T..... Transporter
R-M..... Refiner-marketer
M..... Marketer
G..... Gasoline, wholesale/retail
F..... Fuel Oil, wholesale/retail
D..... Diesel, wholesale/retail
LPG..... Liquefied petroleum gas
wholesale/retail
L..... Lubricants, wholesale/retail
w..... wholesale only
r..... retail only

SHURE...DOING MORE To Solve Your Security Needs.

- A. Shurelock® System III
- B. Combination Drawer Locking System
- C. Shuresafe® System III
- D. Shuresafe® System III
- E. Shuresafe® Duo Drawer Model 670145, Spring-Loaded Tray/Bulk Pass-Thru
- F. Shuresafe® Cassette
- G. Shuresafe® Cassette Model 670319.

Shure's new Shuresafe® System III is constructed of stainless steel, and provides the most secure, tamper-resistant protection for your cash and valuables in your business transactions.



A. C.
D.

Shure

■ASTROLINE CORPORATION

231 John Street
Reading, MA 01867
(617) 942-1600
Key: M. Gw. D. Fw
Herbert A. Sostek, Chmn.
Fred J. Boling Jr., Pres.
Joel A. Gibbs, VP
Richard H. Gibbs, VP
Kenneth B. Monahan, VP
Stephen D. Oppenheim, VP
Wayne Wytzias, VP
Ed Shub, VP
Richard Sullivan, VP

Astroline Pacific, Inc.

200 Ocean Gate (West Ocean Blvd)
Fifth Floor—Suite 540
Long Beach, California 90802
(213) 437-8997
Jerry Smith, VP

Gibbs Oil Company of Texas, Inc.

7600 West Tidwell—Suite 302
Houston, Texas 77040
John B. Kane, Exec. VP
Bud Hancock, VP

■ATLAS OIL CO. OF UTICA

Riverside Drive
P.O. Box 252
Marcy, NY 13403
(315) 724-7431
Key: T. M. G. D. F
Ronald J. Casatelli, Pres.
Peter J. Casatelli, Mktg. VP

■AUTOMATIC COMFORT CORP.

P.O. Box 777
Hartford, CT 06142-0777
(203) 598-1200
Key: M. G. D. F. L
Subs: Oil Comfort, Inc.
Gerber Oil Co.
Petroleum Energy Corp.
A. C. Fuel Corp.
ZIP Corp.
Petro Pantry Corp.
Lewis S. Sheketoff, Pres.-CEO
Ira Kirschner, Treas.-Asst. Sec.
Sidney O. Mellus, VP Optrs.
Dann S. Foster, VP Mktg. (Gas)
Conrad L. Dwir, Sls. Mgr. Mktg.
(Gas)
David A. Duchesne, Data Proc. Mgr.
Leonard F. Schumann, Svc. Mgr.
Joseph T. O'Connor, RFO Sls. Mgr.

■AVALON PETROLEUM CO.

16645 S. Crawford Ave.
Markham, IL 60426
(312) 333-3300
Key: M. G. F. D. L
John Eckenstein, Pres.-CEO
Luke Matic, Gen. Mgr.

■AYERS OIL CO.

4th & Grant Sts.
Canton, MO 63435
(314) 288-4466
Key: M. G. F. D. L
R. E. Ayers, Pres.-Chmn.
J. W. Ayers, First VP
O. L. Tobin, VP, Pet. Mktg. & TBA
Mktg.
K. F. Bishoff, VP Finance
Stephen W. Ayers, Sec.
James Crans, Treas.

■BAGWELL OIL CO., INC.

P.O. Box 136
Onancock, VA 23417
(804) 787-3580
Key: T. M. G. F. D. L
I. W. Bagwell IV, Pres.
I. W. Bagwell III, VP

■E. M. BAILEY DISTRIBUTING CO.

P.O. Box 2576
Paducah, KY 42002-2576
(502) 442-4306
Key: M. G. F. D. L
E. M. Bailey, Pres. & CEO
E. M. Bailey Jr., Exec. VP, Financial
John P. Drew, VP, Purchasing-Whlsl.
Gary W. Robertson, VP Retail-Advtg.

■BALLARD OIL & EQUIP. CO.

P.O. Box 3898-135 Marginal Way
Portland, ME 04104
(207) 772-1991
Howard Sapurley, Pres.
Ilean Caberello, Credit Mgr.
Jud Hazel, Svcs. Mgr.
Wm. Drake, Petroleum-Prod. Sls. Mgr.
Randall Stearns, Equip. Sls. Mgr.

■BATTENFELD GREASE & OIL CORP.

OF N.Y.
1174 Erie Avenue, P.O. Box 728
N. Tonawanda, NY 14120
(716) 695-2100
Key: O-Lubricant Manufacturer; Lw
John A. Bellanti, Pres.
Paul P. Converso, VP-Mktg.
Thomas G. Musilli, VP-Technical Svcs.
Florence B. Bellanti, VP of Admin.

■BEACON OIL CO.

525 W. 3rd St.
Hanford, CA 93230
(209) 582-0241
Key: I. G. Fw. D. L
Sub. of Ultramar PLC London, England
David Bacigalupo, Pres.
Walter Dweile, Sr. VP Mktg.
Joel Mascitelli, Sr. VP, Supply Dist. &
Ref.
Lee Lockhart, VP, Admin.
Mark Montevicchi, Controller
William Empey, Advtg.-Public Relations
Mgr.
Robert Lowe, VP, Whlsl. Supply
H. P. Smith, VP Finance
Albert Blair, VP, Ref.
Ronald Nagy, VP, Financial Svcs.
Thomas Sloan, Treas.
Glenn Gaither, Retail Sls. Mgr.

■BELL FUEL CORP.

31st & Grays Ferry Ave.
Philadelphia, PA 19146
(215) 636-3000
Key: M. O-Terminal Operator; Gw. F. D
Subs: Triangle Petroleum Corp.
William Bell, Pres. & CEO
Steven Kujolic, Exec. VP
William A. Selvagn, VP Mktg.

■BEST OIL CO.

2935 Saw Mill Run Blvd.
Pittsburgh, PA 15227
(412) 888-8777
Key: M. Gr. Dr.
Joseph J. McNally, Pres.
Harley W. Pratt, Exec. VP
Edward J. Szlankiewicz, General Mgr.

Do the New Tank Regs "Buffalo" you...?



Our Storage Tanks make compliance with new state and federal tank regulations simple! Buffalo Tank's underground petroleum storage tanks provide reliable protection against leakage. Whatever the circumstances, we have a tank that will meet your needs:

BT-10 Cathodically Protected Steel

Our BT-10 tanks meet UL requirements and are equipped with non-metallic fittings. Surface is coal-tar epoxy coated and equipped with high-potential sacrificial anodes for maximum corrosion protection. They are backed by a 20-year limited warranty.

Buffhide Clad

Our unique Buffhide tanks feature a strong, dense cladding of polyester and glass fiber for positive protection in highly corrosive soils. UL approved, they are all-welded and are fully insulated from the surrounding soil. No cathodic protection is required. Buffhide tanks have been in use for more than 20 years without a reported leak or failure. They are backed by a 30 year warranty on internal and external corrosion and structural failures.

Double-Walled (Secondary Containment)

Buffalo Double Wall tanks are fabricated from carbon steel in accordance with UL specification (and we also can meet New York City requirements). They are easily monitorable by either mechanical or electronic means. Exterior protection systems include Buffhide and BT-10 with applicable warranties.

We also offer a complete range of field-erected tanks, above-ground tanks and accessories. Take advantage of our environmental expertise and let us help you comply.



Buffalo Tank Division

Bethlehem Steel Corporation
Box 2755
Baltimore, MD 21225
(301) 355-1300
1-800-368-2105

■ **THE BOSWELL OIL COMPANY**
2500 Central Trust Tower
4th & Vine Street
Cincinnati, OH 45202
(513) 421-1200
Key: M; Gw, Fw, Dw

■ **BRAY TERMINALS, INC.**
P.O. Box 956
Glens Falls, NY 12801
(518) 793-8828
Key: M; G, F, D, L
Dana S. Bray Jr., CEO & Pres.
Larry N. King, Exec. VP
Virginia J. Coppola, Sr. VP
Larry DeLuca, Sr. VP

■ **BRENNAN PETROLEUM CO.**
2101 E. Broadway Suite #9
Tempe, AZ 85282
(602) 966-2721
Key: M; G, Dr
Affiliated Company: Sun Valley Oil Corporation
Subs: Brenco Stations
Brenco Sweeping Co.
Ted P. Brennan, Pres.
Tim P. Brennan, Treas. CEO
Barbara Pastrano, Sec.

■ **BROWNING OIL CO.**
P.O. Box 808
Bowling Green, KY 42101
(502) 782-2454
Key: M; G, F, D, L
Subs: Tri-County Oil Co.
Rally Marketing Co.
David R. Browning, Pres.
Joe D. Price, Unbranded Sls.

■ **BURMAH-CASTROL INC.**
401 Hackensack Ave.
Hackensack, NJ 07601
(201) 488-1080
Key: M; Lw
Subs: of Burmah Oil Incorporated
Martin J. Donahue, Pres.
Thomas R. Crane Jr., Exec. VP
Ross Fenster, Dir. of Mktg.
John Gardella, General Sls. Mgr.

■ **DENNIS K. BURKE INC.**
284 Eastern Ave.
Chelsea, MA 02150
(617) 884-7800
Key: M; G, Fw, D, L
Subs: Fleetline Petroleum Products
Dennis K. Burke Truck Stops
Dennis K. Burke, Pres.
Edmund Burke, Exec. VP
Walter Leonard, VP, Mktg.
Arthur Dauwer, Gen. Mgr.-Lubes

■ **BURSAW OIL CORP.**
27 Cherry St.
Danvers, MA 01923
(617) 777-0700
Key: M; G, F, D, L
Subs: Enron Enterprises, Inc.
Seacoast Petroleum
Wm. J. Bursaw Jr., Pres.

■ **BY-LO OIL CO.**
P.O. Box 771
Port Huron, MI 48060
(313) 982-1450
Key: T, M; G, F, D, L
C. S. Lawrence, Pres. & CEO
Craig A. Lawrence, VP, Finance
Charles U. Lawrence, Mktg. VP

■ **BY RITE OIL CO.**
P.O. Box 769, 40600 Grand River
Novi, MI 48050
(313) 477-8887
Key: M; G, F, D, L
Subs: Beacon Oil Co.
Thompson Fuels
N. G. Philpott, Pres.
Cliff Crockett, VP

■ **CALIFORNIA TARGET ENTERPRISES, INC.**
12729 Lakewood Blvd.
Downey, CA 90242
(213) 927-5339
Key: M; G, D, LPG, L
Gary Lazar, Pres.
Robert L. French, VP
Darrell K. Fah, Retail Mktg. Mgr.
Grace Leise, Admin. Assist.

■ **CALUMET REFINING CO.**
Div. of Calumet Industries Inc.
14000 Mackinaw Ave.
Chicago, IL 60633
(312) 828-4713
Key: I; Dw, Fw, Lw
S. Mark Salvino, Pres. & CEO
Roger W. Garey, Sr. VP Mktg.
Phillip A. Campbell, Asst. VP Sls.
Jack C. Rech, Princeton Div. Sls.

■ **CAMPBELL OIL CO.**
P.O. Box 558
Massillon, OH 44648
(216) 833-8555
Key: M; G, F, Lw
Subs: Steiner Oil Co., Wooster, OH
C. K. Campbell, CEO
Jack Decker, Exec. VP

■ **CANNON OIL CORP.**
P.O. Drawer 1850
Dothan, AL 36302
(205) 794-2776
Key: M; G, F, D, Lr
Vernon L. Cannon, Pres. & CEO
Paula Weathers, VP
Glenn Cannon, VP
Glenda Williams, Sec.

■ **CARBO INDUSTRIES**
One Bay Blvd.
Lawrence, L. I. NY 11559
(516) 239-2500
Key: M; F, D
Subs: Gibraltar Oil
Hempstead Utilities
Triboro Fuel Oil
Jacob Hochhauser, Bd. Chm.
Paul Hochhauser, Pres.-CEO
James Grimaldi, Mktg. Sls. Mgr.
Ernest Edrich, Equip. Sls. Mgr.

■ **CARDON CORPORATION**
1837 E. Third St.
Tempe, AZ 85281
(602) 967-7691
Key: T, M; G, D, L
Subs: Cardon Oil
Willford Cardon, CEO
Elijah Cardon, COO
Terry Trendler, VP
Bruce Holbrook, Gen. Mgr.
Loren Rohrer, Supply Coord.

■ **CEL OIL PRODUCTS CORP.**
5402 Dutton Ave.
P. O. Box 5123
N. Charleston, SC 29406
(803) 744-2525
Key: T, M; G, D, F
Subs: Gas-Up Inc.
T. H. Albenesius, Pres.
T. H. Albenesius III, VP

■ **CENEX**
P.O. Box 64089
St. Paul, MN 55164-0089
(612) 451-5151
Key: I, T, R, M; Gw, Fw, Dw, LPGw, Lw
Member-Owner: National Cooperative Refinery Assn.
Darrell Moseson, Pres. & CEO
Noel Estenson, Sr. VP, Petro. & Finance
Joel Blake, VP, Petro. Div.
Gerald Morrow, Dir. Petro. Prod. Mktg.

■ **CENTRAL INDEPENDENT OIL CO.**
R.D. 1
Smock, PA 15480
(412) 677-4408
Key: M; G, F, L
John R. Higinbotham, Pres.
A. D. Higinbotham, Exec. VP
Glenn Knox, Gen. Sls. Mgr.
Deiores Moser, Fuel Oil Mgr.
Sophie Capan, Credit Mgr.

■ **CENTRAL PETROLEUM CO.**
548 Standard Bldg.
Cleveland, OH 44113
(216) 771-0400
Key: M; L
Div. of Wyle Laboratories
Subs: Topsail Lubricants
P. T. Webster, Pres.
C. L. Webster, Gen. Mgr.
L. D. Powers, Farm Sls. Mgr.
William Winchester, Mktg. Mgr.
P. T. Webster, Jr., Lubrication Engr.

■ **CENTURY PETROLEUM CO.**
P. O. Box 1197
Kansas City, MO 64141
(816) 968-2900
Key: M; Gw, LPGw
Subs: of Anadarko Production Co., a Panhandle Eastern Co.
W. R. Kesler, Pres.
W. D. Hughes, VP

■ **CERTIFIED OIL CO.**
303 S. Front St.
Columbus, OH 43215
(614) 224-3175
Key: T, M; G, D, F
Carlyle Baker, Chmn. of Board
Dean Walcutt, Pres. & CEO
Michael Auld, Retail Sls. Mgr.
Fred Shato, Whiske. Sls. Mgr.
Rod Wooley, Mgr. of Trans.

■ **CHAMPLIN PETROLEUM CO.**
Box 7
Fort Worth, TX 76101-0007
(817) 877-6000
Key: R, M; G, Fw, Dw, LPGw
Subs: of Union Pacific Corp.
Subs: Harbor Service Stations, Inc.
W. L. Adams, Pres.
L. W. Marshall, Sr. VP, Manuf. and Mktg.
R. R. Morgan, Gen. Mgr., Mktg.
K. R. Richardson, Mgr., Mkt. Devel.
D. R. Gray, Mgr., Private Brand Mktg.
D. E. Dainton, Mgr., Bulk Sls.
K. M. Jahnik, Mgr., Prod. Supply & Distrib.
S. M. Fuller, Mgr., Prod. Supply
L. B. LeFevre Jr., Mgr., Prod. Distrib.
J. R. Robinson, Mgr., Mktg., Logistics & Eng.
M. L. Bowles, Mgr., Pricing & Special Prod. Mktg.
R. D. Admire, Mgr., Prod. Pricing
E. A. Kerber, Mgr., Special Prod. & Indus. Sls.

■ **CHANEY OIL COMPANY OF VICKSBURG, INC.**
P.O. Box 1353
Vicksburg, MS 39180
(601) 836-2356
Key: M; G, F, D, L
Subs: Dinkins Petroleum Inc.
M. J. Chaney, Pres.
C. Grantham, Treas.
J. W. Doiron, Oper. Mgr.

■ **CHAPMAN, INC.**
P. O. Box 1298
Sherman, TX 75090
(214) 893-8106
Key: M; G
Ellis L. Olmstead, Pres.

■ **CHARTER MARKETING CO.**
P. O. Box 4726
Jacksonville, FL 32232
(904) 350-4082
Key: M; G, D
Subs: of Charter Oil Co.
Joe Leonardo, Pres.
Jim Thompson, Sr. VP, Oper.
Bob Booth, VP, Supply & Trans.
Ron Johnson, VP, Mktg.

■ **CHEKER OIL CO.**
P. O. Box 162
Hazel Crest, IL 60429
(312) 335-0600
Key: M; G, D
J. A. Davidson, Pres.
M. E. Mittleman, VP, Mktg.
H. A. Forshaw, VP, Eng.
W. E. Ott, VP, Fin.

■ **CHEVRON CANADA LTD.**
1500-1050 W. Pender St.
Vancouver, B.C. Canada V6E3T4
(604) 668-5300
Key: I; G, F, D, LPG, L
G. F. Francovich, Pres.
D. R. Kestell, VP, Mktg.
J. D. McMaster, VP, Finance
D. W. Reed, Mktg. & Ref. Mgr.

■ **CHEVRON CORPORATION**
225 Bush Street
San Francisco, CA 94104
(415) 894-7700
Key: I, T, R, M; G, D, Fw, LPGw, L
Subs: Chevron U.S.A. Inc.
G. M. Keller, Board Chmn.
D. L. Bower, Vice Chmn. of Board
J. R. Grey, Pres.
D. N. Maytum, Sec.
R. E. Willoughby, Treas.
G. R. McGregor, Asst. Treas. & Gen. Credit Mgr.

■ **CHEVRON U.S.A. INC.**
575 Market Street
San Francisco, CA 94105
(415) 894-7700
Subsidiary of Chevron Corp.
J. R. Sylla, Pres. & CEO
W. J. Price, Sr. VP, Mktg., Supply & Mktg.
M. M. Smith, VP, Mktg.

■ **Marketing**
L. Taigen, Gen. Mgr., Mktg.-Sls.
W. D. Pugh, Gen. Mgr., Mktg.-Field
J. F. McGuire, Mgr., Retail Div.
W. C. Little, Mgr., Reseller Div.
D. W. Callahan, Mgr., Comm. & Indus. Div.
S. V. Drum, Mgr., Aviation Div.
R. G. Congdon, Mgr., Asphalt Div.
H. R. Hammerman, Mgr., Advertising
G. J. Wylie, Mgr., Mktg. Research
L. L. Day, Mgr., Pricing & Evaluation
H. S. Quilley, Mgr., Mktg. Planning & Svcs.
A. D. Cornwell, Credit Mgr.

■ **Hawaii Division**
1001 Bishop St.
Paahuli Tower
Suite 1060
Honolulu, HI 96813
W. J. Fassler, Mgr.-Sls.
R. M. Arnone, Mgr.-Opns.

■ **Northwest Division**
1301 Fifth Avenue
Seattle, WA 98101
A. O. Rolseth, Mgr.-Sls.
A. O. Rolseth, Mgr.-Opns.

■ **West Central Division**
Two Annabel Lane, Suite 200
San Ramon, CA 94583
T. E. Walter, Mgr.-Sls.
D. Moller, Mgr.-Opns.

■ **Southwest Division**
1201 South Beach Boulevard
La Habra, CA 90631
R. B. Lamer, Mgr.-Sls.
H. H. Haburn, Mgr.-Opns.

■ **Rocky Mountain Division**
Galleria No. Tower II
700 So. Colorado Boulevard
Glendale, CO 80222
A. H. Ward, Jr., Mgr.-Sls.
J. T. Graft, Mgr.-Opns.

■ **Northeast Division**
1200 State Street
Perth Amboy, NJ 08861
D. N. Perkins, Mgr.-Sls.
W. B. Wilbourn, Mgr.-Opns.

■ **East Central Division**
Starks Building
River City Mall and Muhammad Ali
Louisville, KY 40202
J. J. Whitehead, Mgr.-Sls.
C. C. Frazier, Mgr.-Opns.

■ **Southern Division**
340 Interstate North Pkwy.
Suite 200
Atlanta, GA 30339
J. D. Garber, Mgr.-Sls.
J. M. Smith, Mgr.-Opns.

■ **Southeast Division**
One N. University Dr.
Plantation, FL 33324
E. O. Smith, Mgr.-Sls.
E. A. Byers, Mgr.-Opns.

■ **Chevron Canada Ltd.**
1050 West Pender Street
Vancouver, B.C. V6E 3T4
(604) 668-5300
Subs: of Chevron Corp.
Subs: Furnace Oil Sales Limited
Chevron Asphalt Limited
G. F. Francovich, Pres.
D. R. Kestell, VP, Mktg.
K. S. McPae, Mgr., Whisk. Sls.
R. L. Farbridge, Mgr., Retail Sls.
R. D. Jolly, Mgr., Public Affairs

KEY

I Integrated
T Transporter
R-M Refiner-marketer
M Marketer
G Gasoline, wholesale/retail
F Fuel Oil, wholesale/retail
D Diesel, wholesale/retail
LPG Liquefied petroleum gas
L Lubricants, wholesale/retail
w wholesale only
r retail only

■ **W. R. CHILDRESS OIL CO., INC.**
P.O. Box 7337
Fort Worth, TX 76111
(817) 834-1901
Key: M. G. W. Dw
Angelica Childress, Pres.
Robin Childress, VP

■ **CHRISTENSEN OIL CO., INC.**
P.O. Box 2186
Green Bay, WI 54306
(414) 437-3257
Key: M. G. D. F
Herb E. Hoeft, Pres.

■ **CIBRO SALES CORP.**
1040 East 149th St.
Bronx, NY 10455
(212) 585-0800
Key: R. M. G. D. F. L
P. James Massa, Pres.-CEO
Peter Cirillo, Sec.
John Cirillo, Treas.
Nicholas W. Cirillo, Exec. VP
William V. Cirillo, VP
F. Candrea, Mgr., Supply & Opns.
G. A. Shaw, Supv., Marine Opns.
C. Sweet, Mgr., Retail Sls.
Steve Stulic, Whist. Sls.
J. Klopstoc, Reg. Mgr., Albany
Don Sanders, Plant Mgr., Albany
P. Gladis, Gen. Mgr., Philadelphia
F. Saccio, Gen. Mgr., L. I.
R. J. Zinsler, Mgr. Trading
G. Schiesser, Mgr. Trading

■ **CIRCLE K CORP.**
P.O. Box 20230
Phoenix, AZ 85036
(602) 437-0800
Key: M. G. L. Dr.
Bob Hutchinson, Pres.
Robert Burns, Sr. VP Gasoline Opns.
John Clark, Gasoline Mktg. Mgr.
Don Esperson, Gasoline Facil. Mgr.
Mike Sroda, Gasoline Supply & Distrib. Mgr.

■ **CITGO PETROLEUM CORP.**
P.O. Box 3758
Tulsa, OK 74102
(818) 495-4000
Key: I. G. F. D. LPGw, L
Subs. of The Southland Corp.
Subs.: Citgo Pipeline Co.
Citgo Pipeline Investment Co.
Citgo Caribbean Corp.
Citgo International Supply Co.
Citgo International Trading Co.
R. E. Hall, Pres.-CEO
J. H. Dewell, Sr. VP Mktg. & Supply
M. A. Johnson, Sr. VP Ref. & Coord.
P. E. Sedlacek, VP Whisl. Mktg.
M. J. Luitwieler, VP Crude Supply
R. J. Carlton, VP Ref.
R. L. Beers, VP. Lubr. & Spec. Prod.
S. R. Berlin, Gen. Mgr., Fin. Svcs.
W. I. Young, Gen. Mgr., Business & Intor. Sys.
A. L. Sylvester, Gen. Mgr., Prod. Distrib. & Inven. Control
D. C. Lockhart, Gen. Mgr., Prod. Supply & Trad.
H. N. Whitney, Gen. Mgr., Pipeline Opns.
J. E. Thompson, Gen. Mgr., Oper.
C. C. Cormier, Gen. Mgr., Mtg. Svcs.
G. M. Gentry, Gen. Mgr., Eng. & Constr.
R. E. Funk, Gen. Mgr., Lube Oper.
T. G. Richardson, Mgr., Human Resources
R. G. Beck, Mgr., Admin.

■ **THE COASTAL CORPORATION**
Coastal Tower, Nine Greenway Plaza
Houston, TX 77046
(713) 877-1400
Key: I. G. F. D. LPGw, L
Subs: Coastal Refining & Marketing, Inc.
Derby Refining Co.
Pacific Refining Co.
Belcher Oil Co.
O. S. Wyatt Jr., Chmn.-CEO
James R. Paul, Pres.-CEO
F. M. Otto, Sr. Exec. VP Ref. & Mktg.
K. O. Johnson, Sr. VP Ref. & Mktg., East of Rockies
D. J. Hill, Sr. VP Ref. & Mktg., Gulf Coast
A. W. Smith, Sr. VP & Pres. of Belcher Oil Co.

■ **COAST OIL CO.**
4256 Williams Rd.
San Jose, CA 95129
(408) 252-7720
Key: M. G. D. Fw, L
Subs: Barkow Petroleum Co.
Mission Trail Oil Co.
Richard Distributors, Inc.
Coast Oil Stations, Inc.
MT Transportation Co.
Norcal Petroleum Co.
Harbert F. Richards, Pres.
Jerry Cummings, VP, Retail
Royce Andrews, VP, Whisl.
Jack Kloster, Controller
Judi Naumann, Credit Mgr.

■ **COEN OIL CO.**
P.O. Box 9022
Canton, OH 44711
(216) 452-7944
Key: M. G. W. Dw, F. L
Carlton B. Coen, Bd. Chmn.
Charles R. Coen, Pres.
Donald C. Coen, Sr. VP
Earl L. Coen, VP
Ralph J. Kelly, Gen. Sls. Mgr.
Robert I. Kaschner, Cust. Svc. Coord.

■ **COLONIAL OIL INDUSTRIES, INC.**
P.O. Box 576
N. Lathrop Ave.
Savannah, GA 31402
(912) 236-1331
Key: T. M. O-Liquid Bulk Storage, Coal Sales; G. F. D. L
Subs: Interstate Stations, Inc.
Colonial Interstate, Inc.
Chatham Towing, Inc.
Colonial Terminals, Inc.
Robert H. Demere, Pres.
B. E. Leigh, Exec. VP & Treas.
Robert H. Demere Jr., VP
W. A. Baker Jr., VP Opns.
Shack B. Wimbish Jr., VP Sls.
Andrew J. Cobb, Asst. VP, Retail Fuel Oil
John W. Getty, Asst. VP, D.P. Mgr.
G. Herbert Griffin Jr., Sec. & Credit Mgr.
Raymond S. Demere, Retail Sls. Mgr.
Robert W. Jamell, Storage Sls. Mgr.

■ **COMET OIL CO.**
P.O. Box 22033
Savannah, GA 31403
(912) 234-5396
Key: M. G. Dr
W. A. Winburn III, Pres.
Thomas C. Winburn, Sec./Treas.

■ **COMMONWEALTH OIL REF. CO. INC.**
4005-B Broadway
San Antonio, TX 78209
(512) 828-8444
Key: O-Terminal
Subs: Corco Inc.
Corco International
Corco Oil Co.
Corco Marine
Corco Transportation
Corco Tankers Inc.
Stanford N. Phelps, Chmn.
Richard W. Carpenter, Pres.
Warwick J. Drakeford, Exec. VP

■ **COMO OIL CO.**
2716 W. Superior
Duluth, MN 55802
(218) 722-6666
Key: M-Phillips; G. D. F. LPG, L
Subs: Como Gas Sales
Como Lube & Supply
Como Tire & Battery
Myles Hall, Pres.
Gerald Sher, VP
Larry Everett, LPG Mgr.
L. H. Brown, Treas.
Robert Hall, Sec.

■ **CONNA CORP.**
981 S. Third St.
Louisville, KY 40203
(502) 584-1281
Key: M. G. Dr
Subs: Remote Services, Inc.
Convenience Industries of America
Joe P. Peden, Chmn.
Robert T. Johnson, Pres. & CEO

■ **CONOCO INC.**
(Corporate Offices)
1007 Market Street
Wilmington, DE 19898
(302) 594-3400
Sub. of E.I. Du Pont de Nemours & Co.

Conoco Petroleum Operations
5 Greenway Plaza East
P.O. Box 2197
Houston, TX 77252
(713) 253-1000
Key: I. G. D. F. LPG, L
Subs: Kayo Oil Co.
Douglas Oil Co. of Calif.
C. S. Nicandros, Pres.
E. J. Grivetti, Exec. VP, Explor. & Prod.
D. R. Clark, Exec. VP, Petro. Prod.
O. Newell Jr., Exec. VP, Mlg. Tech.

■ **CONSUMERS GASOLINE STATIONS INC.**
P.O. Box 23309
Nashville, TN 37202
(615) 259-3226
Key: M. G. Dr
W. F. Davidson, Pres.
L. C. Morris, VP

■ **CONSUMERS OIL CORP.**
1473 Lambertson Rd.
P.O. Box 8667
Trenton, NJ 08650
(609) 394-8101
Key: M. G. D. F. L
Richard Fineburg, Pres.
Merton Goodall, VP
John Douglas, Gen. Mgr.-Gasoline
William Dillmeier, Gen. Mgr.-Fuel Oil

■ **CONSUMERS OIL SERVICE INC.**
541 Mantua Ave.
Paulsboro, NJ 08066
(609) 423-0010
Key: M. G. D. F. L
James D. Cameron, Pres.

■ **CONSUMERS PETROLEUM**
P.O. Box 546
808 Post Rd.
Fairfield, CT 06430
(203) 259-5211
Key: M. G. F. D. LPG, L
E. Wihl, Pres.

■ **CONSUMERS PETROLEUM CO.**
13507 Auburn Ave.
Detroit, MI 48223
(313) 273-3800
Key: M. G. F. D. LPG
William Feldman, Pres.
Frank Carroll, Sec./Treas.
Bruce Butzler, Sls. Mgr.

■ **CONVENIENCE DIVISION, LOEB INC.**
(Formerly Top Valu Gasmarts)
488 Industrial Avenue
Ottawa, Ontario K1G 3K8 Canada
(613) 737-1350
Key: M. G. F. D. LPG, L
Sub. of Loeb Inc.
Subs: Provigo Inc.
H. Paul Gobeil, Pres.-COO, Loeb Inc.
William Kipp, Exec. VP, Loeb Inc.
David Guilfoyle, Gen. Mgr. Conv. Div.
Brian Tweedie, Mktg. Mgr. Ottawa
Peter Murray, Mktg. Mgr. Toronto

■ **COOK & COOLEY, INC.**
1701 W. Wardlow Rd.
Long Beach, CA 90810
(213) 549-3161
Key: M. G. Dw
Robert T. Bodamer, Pres.
Sylvia Bodamer, Sec.
Gerald Bodamer, VP
Jack J. Reed, Gen. Mgr.

■ **CORAL RIDGE CORP.**
10615 National Turnpike
Fairdale, KY 40118
(502) 366-1935
Key: M. G. Dr, Fr, Dr, LPG, L
B. G. Broadhurst, Pres.
Billie Jean Broadhurst, VP

■ **CORY OIL CO.**
Box 21303
Phoenix, AZ 85036
(602) 273-1818
Key: T. M. Gw, Fw, Dw, LPGw, Lw
Phil Cory, Pres.
Karel Overly, Sec.

■ **CRYSTAL FLASH PETROLEUM CORP.**
P.O. Box 584
Indianapolis, IN 46206
(317) 872-6010
Key: M. G. F. D. L
Mac Fehsenfeld, Pres.
Fred Fehsenfeld, VP/Treas.
Frank Fehsenfeld, Chmn.
Lewis Davis, Sec.

■ **CRYSTAL PETROLEUM CO.**
P.O. Box 4180
Corpus Christi, TX 78469
(512) 883-6574
Key: M. G. D. Lw
C. A. Robertson Jr., Pres.
R. M. Carroll, Mgr. Gen. Sls.

■ **CRYSTAL REFINING CO.**
801 N. Williams
Carson City, MI 48811
(517) 584-3157
Key: T. O. Gw, Fw
Marvin Fleischman, Pres.

■ **C.S.C. OIL COMPANY**
P.O. Box 4309
Louisville, KY 40204
(502) 589-5357
Key: M. G. F. Dw, L
Ken Stephens, Pres.
William G. Shepard, Exec. VP
William F. Burbank, Sec.
Gypsy Oak, Controller

■ **CUMBERLAND OIL COMPANY**
7260 Centennial Boulevard
Nashville, Tennessee 37209
(615) 297-8531
Key: T. M. O-Terminals; Gw, Fw, Dw, Lw
John F. Cummins, Pres.
Richard F. Cummins, VP & Gen. Mgr.
V. H. Hurncutt, Sec.
S. C. Lockett, Mgr., Fuel Oil Sls.
D. V. Harrelson, Mgr., Indus. Oil Sls.
A. Humphrey, Retail Mgr.

■ **CUNNINGHAM OIL CO.**
343 Carswell Ave.
Holly Hill, FL 32017
(904) 253-7621
Key: M. Gw, D. L
Lee C. Culler, Pres.
Jarry Olson, VP, LPG Div.
Bob Thurman, VP

■ **CURT'S OIL CO.**
Box 1753
Muskogee, OK 74402
(918) 682-7888
Key: T. M. G. L
Thurman Curtisinger, Pres. & CEO
David Clark, VP
Bob J. Curtisinger, Sec.

KEY

I..... Integrated
T..... Transporter
R-M..... Refiner-marketer
M..... Marketer
G..... Gasoline, wholesale/retail
F..... Fuel Oil, wholesale/retail
D..... Diesel, wholesale/retail
LPG..... Liquefied petroleum gas
wholesale/retail
L..... Lubricants, wholesale/retail
w..... wholesale only
f..... retail only

■ **CURTIS PARKER OIL CO. INC.**
P.O. Box 6081
Shreveport, LA 71136
(318) 866-2716
Key: M: Gw, Dw, Lw
B. K. Eaves, Pres. & CEO
Clay G. Eaves, VP, Sls.
Darrell L. Moyer, Opns. Mgr.
Hollis G. Coe, Warehouse Supt.

■ **DAIRY MART, INC.**
240 South Rd.
Enfield, CT 06082
(203) 745-1661
Key: M, O-C-Store; Gr
Charles Nirenberg, Chmn. & CEO
Steve Montgomery, Pres.
Laurence D. Handler, Exec. VP
Frank Colacino, VP
Mitchell Kupperman, VP
Leonard Crogan, VP

■ **D & W OIL CO.**
14339 Wyoming Ave.
Detroit, MI 48238
(313) 834-2580
Key: M: F, D, Lw
Charles F. White, Pres.
Charles A. White, VP
Larry E. Bigelow, VP

■ **K E DAVID LTD**
443 Passon Ave.
Glenside, PA 19038
(215) 886-8900
Key: M: G-Cito, F, D, L
Ken David, CEO
Kenneth David, Pres.
Kent David, Exec. VP
Fred Cassio, VP, Mktg.
Chas. Kelb, Gen. Sls. Mgr.

■ **DAVIS-HOWLAND OIL CORP.**
290 Anderson Ave.
Rochester, NY 14607
(716) 473-6650
Key: O-Lubricants Manufacturer; Lw
Subs: H&W Chemicals
Lawrence R. Klapper, Pres.
Robert Kiely, VP
Anne Vaughan, VP

■ **DEAD RIVER CO.**
55 Broadway
Bangor, ME 04401
(207) 773-5841
Key: T, M: G, F, D, LPG, L
Subs: Scott Transportation
Webber Tanks Inc. (50%)
P. Andrew Nixon, Pres. & CEO
F. M. McClain, VP, Petro.
F. H. Wallace, Gen. Mgr. Reg. 1
A. W. Walton, Gen. Mgr. Reg. 2
W. R. Hamm, Prod. Procurement

■ **DEBLOIS OIL COMPANY**
P.O. Box 6027
Providence, RI 02940
(401) 722-0000
Key: M: G, F, D, LPG, L
Subs: Beacon Oil Company
Petroleum Service Importing Co.
Arthur J. DeBlors Jr., CEO
Robert E. DeBlors, Pres.
David J. Splaine, Sr. VP
Ralston R. Silva, VP, Opns.
Wendell P. Clare Jr., VP, Finance
Arthur J. DeBlors III, VP, Admin.
Stephen J. DeBlors, VP, Sls.
Charles H. DeBlors Jr., VP, LPG
Michael B. Messori, Mgr., Supply
Robert J. Cote, Mgr., Whlsl. Sls.
Ronald W. Joseph, Mgr., Motor Fuel Sls.
Bruce K. Smith, Mgr., Heating Oil Sls.
Stanley W. Zuba, Credit Mgr.

■ **DESERT COUNTIES OIL**
30370 E. Highway 58
Barstow, CA 92311
(819) 258-8616
Key: T, M: G, D, L
Frank H. Grenke, CEO
Richard Becktel, Pres.
Donovan Grenke, Exec. VP

■ **DESERT OIL CO.**
P.O. Box 609
Rock Springs, WY 82902
(307) 362-6611
Key: T, M: G, D, L
C. Keith West, Pres. & Chmn.
Charles K. West II, Exec. VP, Whlsl. &
Gen. Sls. Mgr.
Joe Legerski, Opns. Mgr.
Jim Turano, Trans. Mgr.
Diane Blazovich, Credit Mgr.
Zsanne Henderson, Sec.
Steven P. West, Mktg. VP, Retail

■ **DIAMOND INDUSTRIES**
A and So. Heald Sts.
P.O. Box 629
Wilmington, DE 19809
(215) 459-9105
Key: M: G, F, D
Subs: Altmos Fuel Oil Co., Allentown
Diamond Management
Diamond Fuel Oil Co.
Diamond Petroleum Co.
Diamond Ice & Fuel Co.
Medford-Dunleavy, Inc.
Stanley W. Mann, Pres. & CEO
Louis Manerchia, Sr. VP
R. Gardner Kahoe III, Esq. Sr. VP
R. T. Wright, VP

■ **DIAMOND SHAMROCK REFINING & MARKETING COMPANY**
P.O. Box 20267
San Antonio, TX 78220
(512) 223-2631
Key: R, M: G, Fx, D, LPGw, L
Sub. of Diamond Shamrock Corporation
Subs: Signor Retail
Autotronic Systems, Inc.
Industrial Lubricants
Riley Eggs, Pres.
Dewey Mark, Exec. VP
Ed Prater, VP, Manufacturing
Robert Farmer, VP, Mktg. Group
Kenneth Floyd, VP, Whlsl. Mktg.
Tom Lyons, VP Retail Mktg., Autotronics
Joe Walden, VP Retail Mktg., Signor
Jim Jenkins, VP, Industrial Lub.
Lamar Simmons, Zone Mgr., Whlsl.
Dan Engler, Zone Mgr., Whlsl.
Ken Eston, Zone Mgr., Retail
John McPherson, Zone Mgr., Retail
G. Mayberry, Eastern Div. Mgr., Retail
W. Hilbert, Mgr. Industrial Sls.
Larry Johnson, Mgr. Commercial Sls.
Mike Russell, Mgr. Merchandising &
Promo.
Gene Smith, Mgr. Joobar
Communications



RYKO automatic car wash equipment is the ideal tool to increase gasoline sales in today's highly competitive petroleum market.

The RYKO Mini-Tunnel is designed to operate completely unattended and is the ultimate

vehicle wash/dry system. The result of over a decade of engineering design and testing, this all aluminum vehicle wash combines efficiency and economy with customer satisfaction. The automatic and self-contained Mini-Tunnel thoroughly washes, waxes and dries vehicles of all sizes—from the smallest imports to vans.

The Mini-Tunnel has four cycle programs to cover a complete range of cleaning requirements and is easily tailored to the specific volume and cleaning needs of any location.

For more information on the RYKO Mini-Tunnel, please contact:



RYKO Manufacturing Company
11600 N.W. 54th Avenue
P.O. Box 38
Grimes, Iowa 50111
(515) 986-3700
TWX (910) 520-2546

■ DICKEY INC.
P.O. Box 808
Packwood, IA 52860
(319) 695-3601
Key: T, M; G, F, D, L
Subs: Harold Dickey Transport
Dickey Dist. Inc.
Dickey Farms Inc.
Doug Dickey, Pres.
Harold Dickey, VP
Dave Dickey, Sec.
Dan Dickey, Traffic Mgr.
Deb Bemis, Treas.

■ DIXIE OIL CO.
Rt. 5, P.O. Box 1087
Tifton, GA 31783
(912) 382-2790
Key: T, M; G, D
W. F. Lindsey, Chmn. Bld.
Bobby B. Lindsey, Pres. & CEO, Sls.
Mgr.
Rheudson Derby, VP

■ DRAKE'S REFINING STATION
P.O. Box 13129
Lansing, MI 48901
(313) 384-6747
Key: M; G, Dr
Subs: Popcorn Planet Inc.
Michael P. Drake, Pres.
Keith Griffes, VP
Daniel G. Vartanov, VP

■ EAST COAST OIL CORP.
1420 E. Commerce Rd.
Richmond, VA 23234
(804) 232-2373
Key: M; G, Dr
Thos. N. Allen, Chmn.
John M. Steele, Pres. Petro. Div.

■ ENGLEFIELD OIL CO.
447 James Parkway
Newark, OH 43055
(614) 828-8215
Key: M; G, F, D, L
Subs: Oil Service Corp.
Freight Sales Inc.
F. W. Englefield III, Pres.-CEO
Ed Stephens, VP Ops.
F. W. Englefield IV, Admin. VP
Ben Englefield, VP Supply/Trans.
Frank McManus, VP
Fred Kaseman, CPA
Chuck Pannier, Reg. VP

■ ERGON, INC.
Pearl at Lamar
P.O. Drawer 1639
Jackson, MS 39205
(601) 948-3472
Key: I, Dr, Fx, LPG, L
Subs: Lampton Love
Ergon Refining Co.
Ergon Exploration Co.
L. B. Lampton, Chmn. & Pres.
R. F. Cox, Sr. VP, Exploration
George D. Ishee, Sr. VP Crude
L. B. Lampton Jr., VP Retail Sls.
Lee C. Lampton, VP, Whsl. Sls.
J. Everett, Area Sls. Mgr.

Product Terminals:
Chattanooga, TN 37405
(615) 266-6723

Greenville, MS 38701
(601) 332-4849

Memphis, TN 38113
(901) 775-1247
Wm. Baker, Area Sls. Mgr.

Mobile, AL 36601
(205) 438-9891

Vicksburg, MS 39180
(601) 630-7581

Yellow Creek, MS 38852
(601) 423-3885

Baton Rouge, LA 70897-3401
(504) 775-0526

■ ERICKSON PETROLEUM CORP.
Box 1224
Minneapolis, MN 55446
(612) 830-8700
Key: T, M; Gr
Alfred W. Erickson, Pres.
Ronald A. Erickson, Exec. VP
Dick Mills, VP, Sup. & Distrib.

■ ESTE OILS CO.
5556 Vine St.
Cincinnati, OH 45217
(513) 242-5380
Key: M; G, F, L
August J. Abers, CEO
Joseph R. Abers, Pres.
Mike Riehemann, VP, Sls.
Tom Lilla, Gen. Sls.

■ EXXON COMPANY, U.S.A.
P.O. Box 2180
Houston, TX 77253-2180
(713) 666-3638
Key: I, G, Fx, D, LPG, L
Sub. of Exxon Corporation
Randall Meyer, Pres.
E. J. Hess, Sr. VP
R. P. Larkins, Mktg. VP
R. T. Harvin, Whsl. & Ind. Bus. Mgr.
S. M. Peerman, Retail Bus. Mgr.
C. B. Raglin, Planning Mgr.
R. A. Rosenberg, Coord. & Svcs. Mgr.
K. R. Fink, Bus. Devel. Mgr. (Rt.)
E. F. Aggs, Bus. Devel. & Anal. Mgr.
(W&IB)
J. S. Dick, Mktg. Tech. Svcs. Mgr.
W. L. Hull, Nat'l. Assls. Mgr.

Retail Business Center
Box 4388
Houston, TX 77219-4388
(713) 991-8160
W. L. Walker, NE Reg. Sls. Mgr.
J. L. Whitehurst, SE Reg. Sls. Mgr.
R. V. Hansen, Western Reg. Sls. Mgr.
J. D. Adams, CORP. Reg. Sls. Mgr.
W. E. Gattis, Real Est. & Eng. Mgr.
R. P. White, Distrib. Mgr.
T. M. Potts, Prod. Distrib. Mgr.
B. L. Conner, Allied Prod. Sls. Mgr.
J. L. Stanislaus, Advcr. Mgr.

EBW 660 EMERGENCY SHUT-OFF VALVE



THREE
VALVE
STYLES
AVAILABLE

Size: 1-1/2"

The EBW 660 Emergency Shut-off Valve shuts off fuel supply instantly in the event of collision or fire. EBW 660 features — Concealed shear section in replaceable adaptor • For service can be opened and closed externally • Test plug with provision for seal wire • Straight through flow for minimum restriction • Thermomechanical fire protection • Corrosion resistant • Threaded bosses for rigid mounting • Three models, all U.L. registered. Write for latest brochure.

Distributors in over 350 cities

The next time you buy, specify EBW quality equipment...YOUR MONEY DESERVES IT!



ENTERPRISE

2814 McCracken Ave., Muskegon, Michigan • 49443 • 800 253-8435

VALVES, FITTINGS & ACCESSORIES FOR OIL & CHEMICAL INDUSTRIES



KEY

I..... Integrated
T..... Transporter
R-M..... Refiner-marketer
M..... Marketer
G..... Gasoline, wholesale-retail
F..... Fuel Oil, wholesale-retail
D..... Diesel, wholesale-retail
LPG..... Liquefied petroleum gas
L..... Lubricants, wholesale-retail
W..... Wholesale only
F..... Retail only

The winning combination

from
Ferranti-Packard

Gas price signs
Message centers
Pump readouts
Operated from one console

We supply the integrated solution to your automated signage and pump pricing needs.

The package includes:

- changeable price signs to allow instant response during price wars
- attractive message centers to advertise accessories and C-Store specials
- pump readouts that are the most visible and reliable on the market

And all these products can be operated with fingertip convenience from your kiosk or office. Contact us for the total package, or any individual item.

NEI

Ferranti-Packard Electronics Ltd.

An NEI Company
6030 Ambler Drive
Mississauga, Ontario L4W 2P1 Canada
(416) 624-3020 Telex: 35-961437



■ **FAIRLIE & WILSON CO.**
533 So. 5th St.
Elizabeth, NJ 07206
(201) 354-2100
Key: M; Dr. Fr
Sub: Eastern Fuel Co.
John B. Wade Jr., Pres.-CEO
Richard J. Wade, VP
Walter R. Engel, Sls. Mgr.

■ **FARM-OYL CO.**
2333 Hampden Ave.
St. Paul, MN 55114
(612) 646-7571
Key: M; O-Manufacturer; Lw
Robert Larson, Pres.-CEO
Richard Hill, VP, Mktg.
Robert Anderson, Corporate Sec.
Bruce Larson, Corporate Treas.

■ **FARMLAND INDUSTRIES**
3315 N. Oak Trafficway
Box 7305
Kansas City, MO 64116
(816) 459-6000
Key: R; M; Gw, Fw, Dw, LPGw, Lw
Sub: Farmland International Energy
K. A. Nielsen, Pres.-CEO
R. H. Wakerfield, VP, Petroleum Opns.
J. M. Farley, VP, Refined Fuels
O. N. Shoup, VP, NGL, Natural Gas
G. H. Richter, VP, TBA/Lubricants

■ **FARM STORES**
5800 N.W. 74th Ave.
Miami, FL 33166
(305) 592-3100
Key: T; M; G
Allen S. Fogg, Chmn.
Tim Kitchen, Pres.
R. N. Simon, Mktg. Dir.
S. M. Fogg, VP, Opns.

■ **ROBERT FAWCETT & SON CO.**
Tyler Ct.
Cambridge, MA 02140
(617) 547-2360
Key: M; F
Subs: Automatic Heating Service
Monroe Oil
Gallagher Oil Co.
A. W. Nile Co.
Robert R. Fawcett, Pres.
Richard B. Fawcett, Exec. VP
Robert W. Fawcett, Treas.

■ **FCX, INC.**
P.O. Box 2419
Raleigh, NC 27602
(919) 828-4411
Key: T; R; M; G; D, F, L, LPG
Jack R. Taylor, Pres. & Gen. Mgr.
Robert Wilcox, VP, Corporate Oper.
Robert Lyford, VP, Chief Financial Officer
Edwin R. Jones Jr., Dir. Petro. Div.
Jerry Senter, Mgr., Petro. Div.

■ **FEDERATED CO-OPERATIVES LTD.**
Box 1050
Saskatoon, Sask, Canada S7K 3M9
(306) 244-3311
Key: R; M; G; F, D, L
Sub: Consumers Co-operative Refinery
Wayne Thompson, CEO
Elmer Wiebe, VP, Mktg.
Al Pasloske, Treas.
Al Robinson, Agro Div. Mgr.
Lynn Hayes, Petro. Mktg. Mgr.
Bud Dahlstrom, Refinery Mgr.

■ **FIRELINE PETROLEUM INC.**
777 Dedham St.
Canton, MA 02021
(617) 826-4900
Key: M; G; Fw, D
Sub: of Cumberland Farms Inc.
D. B. Haseotes, CEO
R. M. Quinlan, Dir. Petro. Mktg.
Jack Ryan, Dir., Supply & Distrib.
Neil Lawrence, Sup./Dist. Mgr.

■ **FISCA OIL CO.**
P.O. Box 3363
Kansas City, KS 66103
(913) 236-7000
Key: M; Gr, Dr
M. R. Hudson, Pres.-CEO
W. M. Van Horn, Exec. VP
Robert Crews Jr., Mktg. VP/Treas.
Arnold A. Allen, Sec.

■ **FISKE BROTHERS REFINING CO.**
129 Lockwood St.
Newark, NJ 07105
(201) 589-9150
Key: O-Independent Oil compounder;
L
Fred Snyder Jr., Pres.-CEO
John F. Cusack, VP, Gen. Mgr.
Richard McCluskey, Controller

■ **FKG OIL CO.**
P.O. Box 122
Belleville, IL 62222
(618) 233-6754
Sub: of Moto, Inc.
V. Kirchhoff, Pres.-CEO
C. Parrish, Exec. VP
R. Haase, VP, Purch.
D. Howellman, VP, Opns.
J. Forsyth, Mktg. VP

■ **F. O. FLETCHER OIL, INC.**
471 N. Curtis Rd.
Boise, ID 83706
(208) 377-0024
Key: M; G; F, D
Subs: Price-Less Gas, Inc.
Sav-way, Inc.
Peter L. Hirschburg, Pres.
Andrew A. Frick, VP
Catherine A. Ayers, Gen. Sls. Mgr.

■ **FLYING J INC.**
P.O. Box 678
Brigham City, UT 84302-0678
(801) 734-9416
Key: I; G; D, F, LPG, L
Subs: Flying J Travel Plazas
Flying J Convenience Stores
O. Jay Call, Pres.
J. Phillip Adams, Sr. VP
R. E. Germer, Sr. VP

■ **FORTMEYER'S INC.**
P.O. Box 8001
Fort Wayne, IN 46808
(219) 489-3511
Key: I; G; F, L
Howard Fortmeyer, Pres.
Tim Schoenherr, Sec. Treas.
Larry Mayers, Tire Mgr.

■ **FOSTER OIL CO.**
36065 Water St.
Richmond, MI 48062
(313) 727-3315
Key: M; G; F, D, L
Richard Foster, Pres. & CEO
Harold McVinch, VP, Distrib.
Thomas Foster, Mgr., Co. Opns.

■ **FOUR STAR SERVICE STATIONS**
767 44th St. SW
Grand Rapids, MI 49509
(616) 534-4913
Key: M; Gr, Fr, Dr, Lr
Ray D. Mulliken, CEO
Joanne A. Grubbs, Pres., Sec. Treas.

■ **FRANKO OIL COMPANY**
P.O. Drawer 3440
Eugene, OR 97402
(503) 687-9200
Key: T; M; Gr, Dr, Lr
Affiliate: Mid Oil Company
Jones Transport Co.
Frank Boresek, Pres. & CEO
Ron McPherson, VP, Mktg.
Terry Hillier, Controller
Bob Hought, Asst. VP, Mktg.

■ **GARD CORPORATION**
2727 Roe Lane
Kansas City, KS 66103
(913) 236-5000
Key: M; L
Louis Cohn, Chmn. Brd.
Leslie D. Cohn, Pres. & CEO
Jack Cohn, VP, Plant Opns.

■ **GARY ENERGY CORP.**
115 Inverness Dr. East
Englewood, CO 80112
(303) 779-3800
Subs: Gary Refining Inc.
Bloomfield Refining Inc.
Key: I; Gw, Fw, Dw
Ron Williams, Pres.
Joe Wann, VP, Supply, Ref. & Mktg.
Tom Bruskotter, Mgr., Supply & Mktg.
Don Hamilton, Dir. of Light Oil Exchange

■ **GAS CITY LTD.**
160 S. LaGrange Rd.
Frankfort, IL 60423
(312) 242-6070

■ **GASCO GASOLINE INC.**
P.O. Box 1501
Oxnard, CA
(805) 485-9523
Subs: Anchor Refining Co.
Desert Petroleum Inc.
Key: I; G; Fw, D
William E. Thompson, Pres.
Ben Larner, Exec. VP
Michael L. Saliba, VP
Robert G. van der Valk, Mgr., Supply & Mktg.-Southern District
Patrick W. Barneaut, Mgr., Supply & Mktg.-Northern District

■ **Anchor Refining Co. Inc.**
William E. Thompson, Pres.
Michael L. Saliba, VP

■ **Desert Petroleum Inc.**
Gary Carson, Exec. VP
John D. Rutherford, Mgr., Mktg. Devel.

■ **GAS-N-GO, INC.**
4141 Lake Ave., P.O. Box 2
Ashtabula, OH 44004
(216) 964-6183
Key: M; G; Fw, Dw, L
R. H. Keyes, Pres. & CEO
N. L. Keyes, Sec. Treas.

■ **GASTOWN, DIV. OF EMRO MARKETING CO.**
23660 Miles Avenue
Bedford Heights, OH 44128
(216) 475-9212
Key: M; Gr, Fr, Dr, Lr
Sub: of Marathon Petroleum Co.
Ronald Rupp, Pres.
Ike R. Melford, VP, Mktg.
Robert A. Molinski, VP, Controller
Stephen G. Baker, Opns. Mgr.
James Morgan, Sls. Mgr.
William J. O'Neill, Const. & Devel. Mgr.
John L. Gee, Fast Food Mgr.

■ **GATE PETROLEUM CO.**
P.O. Box 23627
Jacksonville, FL 32217
(904) 737-7220
Herb H. Peyton Jr., Pres.
Wayne Levitt, Pres., Gate Mktg.

■ **GELBACH PETROLEUM CO.**
Box 157
Valley Park, MO 63088
(314) 225-3601
Key: T; M; G; F, D, LPG, L
Mary Devereaux, Pres.
Bob Ewen, VP, Gen. Mgr.
Gary Stewart, Mktg.
Kathy Foltz, Gasoline Sls.

■ **GEM PETROLEUM**
8710 E. Broadway
Tampa, FL 33619
(813) 626-2151
Key: M; Gr
Sub: of Shop & Go, Inc.
John Jack, VP
Jim Robinson, Gen. Mgr.

■ **GENERAL OIL CO.**
P.O. Box 2336
Batesville, AR 72501
(501) 793-9871
Key: T; M; G; F, D
Subs: General Transport Co.
Charles Oil Co.
H. Paul Willmuth, Chmn.
Paul Willmuth, Pres. & CEO
Charles Willmuth, VP, Constr.
Andy Moore, Exec. VP
David Moore, Retail VP
R. E. Warner, Whsl. VP

■ **GIANT INDUSTRIES, INC.**
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Key: R; M; G; D
Divs: Giant Refining Company
Giant Service Stations
James E. Acndge, Pres. & CEO
Alvis J. Moore, Exec. VP
Robert L. Harvey, VP, Finance
Stephen J. Antol, Treas.
Craig G. Colley, VP, Supply/Mktg.
Ronald S. Williams, VP, Retail Opns.

■ **Giant Refining Co.**
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Earl Blanchard, VP & Gen. Mgr.
Guy Yates, VP, Mktg.
Vince Ontiveros, Mgr., Prod. Sup.
Renee Papin, Mktg. Rep.
Jim Saxton, Mktg. Mgr.

■ **Giant Refinery—Ciniza**
Route 3, Box 7
Gallup, NM 87301
(505) 722-3833
Carl Shook, Opns. Mgr.

■ **Giant Transportation**
Route 3, Box 7
Gallup, NM 87301
(505) 722-3833
Jerry Puckett, Mgr.

■ **Giant Service Stations**
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Terry Cress, Gen. Mgr.
George Armento, Mgr., Goodies
Convenience Stores

■ **GIFFORD ENERGY CORP.**
58 S. Tyson Ave.
Floral Park, NY 11001
(516) 354-5555
Key: M; F
Melvin Sevin, Chmn.
Al Taulie, Pres.
Irik Sevin, VP
Chris English, Branch Mgr.

■ **GLOBAL PETROLEUM CORP.**
800 South St.
Waltham, MA 02254
(617) 894-8800
Key: M; Gw, Fw, Dw
Subs: First Petroleum Corp.
Montello Oil Company
Alfred A. Silfka, Pres.
Richard Silfka, Treas.
Thomas A. McManmon Jr., Sr. VP
Willard S. Poires Sr., VP, Trading & Supply
Arthur D. Katzenberg Jr., Sr. VP, Mktg.
Paul Harwood, VP
Richard B. Salmonsan, VP, Mktg.
Alfred J. Staples Jr., Mgr., Gasoline
Francis P. Sears, Mgr., Residual Fuel

■ **GLOBE OIL COMPANY, U.S.A.**
P.O. Box 47546
Doraville, GA 30362
(404) 458-8100
Key: M; G; D
Sub: Starvin Marvin Food Stores
R. Ellis Godshall, Pres.
Robert W. Eaves, Exec. VP
O. Gordon Cope, Exec. VP
Richard L. Langford, VP, Finance
Fred J. Goss, Dir., Mktg.

■ **GODWIN OIL CO.**
P.O. Box 1888, 129 Castle Hayne Rd.
Wilmington, NC 28402
(919) 782-0312
Key: T; M-Texaco & Phillips; G; F, D, L
E. P. Godwin III, Pres.
Charles Godwin, VP, Opns. Mgr.
Tom Pearsall, VP, Opns. Mgr.
William C. Godwin II, Sec./Treas., Mgr., Real Estate
Earl Ward, Off. Mgr.
Rex Fountain, Credit Mgr.

■ **GOLDEN EAGLE REFINING CO., INC.**
707 Wilshire Blvd., Suite 5200
Los Angeles, CA 90017
(213) 624-7841
Key: I; Gw, Fw, Dw
Sub: of Ultramar PLC
Joel Masciotti, Sr. VP
Murray Covert, VP
Mike Ayres, Ref. Mgr.

KEY

I Integrated
T Transporter
R-M Refiner-marketer
M Marketer
G Gasoline, wholesale/retail
F Fuel Oil, wholesale/retail
D Diesel, wholesale/retail
LPG Liquefied petroleum gas
L Lubricants, wholesale/retail
W wholesale only
r retail only

■ **GOLDEN GATE PETROLEUM CO.**
2200 Powell St., Suite 959
Emeryville, CA 94608
(415) 428-2000
Key: T. M.; G. F. D. LPG, L
Subs: Bay Area Petroleum Co.
Golden Gate Petroleum Int., Ltd.
Holdener Petroleum Co.
Golden Gate Marine Sales
Dennis M. O'Keefe, Pres. & CEO
Richard C. Dawson, Exec. VP
Willem Spiegel, CFO & Treas.
Chris Price, Gen. Sls. Mgr.

■ **GOLUB CORP.**
501 Duaneburg Rd.
Schenectady, NY 12306
(518) 355-5000
Key: M.; Gr-Chevron, DR
Lewis Golub, CEO
Neil M. Golub, Pres.
Simon P. Brennan, VP, Svc. Stas.

■ **GRAMCO LTD.**
P.O. Box 108
Fennimore, WI 53809-0108
(608) 822-3201
Key: M.; Gw, Fw, Dw, Lw
Paul S. Graham, Pres.

■ **GREAT RIVER OIL COMPANY**
20 Ladue Meadows
St. Louis, MO 63141
(314) 567-4852
Key: M.; G. L
Subs: Oklahoma Petroleum Co.
Robert L. Burg, Pres.
R. E. Clark, VP, Mktg.
Irving Dubinsky, Sec./Treas.

■ **GRESHAM PETROLEUM CO.**
P.O. Box 690
Indianola, MS 38751
(601) 887-2160
Key: M.; G. F. D. LPG, L
W. W. Gresham Jr., Pres. & CEO
W. W. Gresham III, Sec./Treas., COO.
Mktg. VP
John M. McPherson, Exec. VP
Tom Gresham, Sls. & Adv. Mgr.

■ **JACK GRIFFITH PETROLEUM PRODUCTS, INC.**
P.O. Box 1747
Stillwater, OK 74076
(405) 372-7885
Key: M.; G. D. Lr
Subs: Gasoline Marketing, Inc.
Affine Trucking, Inc.
Griffith Petroleum Mgmt. Corp.
Jack A. Griffith, Pres. & CEO
Jim Griffith, Exec. VP, COO
David Johnson, Gen. Sls. Mgr.
Stephan T. James, Comptroller

■ **GROWMARK, INC.**
P.O. Box 2500
Bloomington, IL 61701
(309) 557-2419
Key: M.; Gw, Fw, Dw, LPGw, Lw
O. Glenn Webb, Chmn. & Pres.
Kenneth P. Baer, Exec. VP & CEO
Marvin L. Weisert, VP, Mktg.
John Kelly, Mgr., Petro. Div.
Sam Schriner, Dir., Sls. Svcs.

■ **GULF STATES OIL & REFINING CO.**
P.O. Box 53137
Houston, TX 77052
(713) 751-2000
Key: I.; Gw, Fw, Dw, LPGw
Thomas C. Thompson, Pres., Chmn., CEO
John Scott Thompson, COO

■ **GULL INDUSTRIES INC.**
P.O. Box 24687
Seattle, WA 98124
(206) 624-5900
Key: M.; G. F. D.
Cecil L. True, CEO
Douglas L. True, Exec. VP
William L. True, Exec. VP
Jack Kreider, VP, Whsl.
Larry Hitchcock, VP, Retail

■ **GUTTMAN OIL COMPANY**
200 Speers Road
Belle Vernon, PA 15012
(412) 483-3533
Key: M.; G. F. D. LPG, L
Subs: Mid-Penn Refining Co.
Howard S. Guttman, CEO
Alan R. Guttman, Pres.
Maury Guttman, Exec. VP
Richard M. Guttman, VP
Gene Solomon, Branch Mgr.

■ **HALSTED-QUINN FUEL CO.**
33 Hubbell Dr.
Mt. Kisco, NY 10549
(914) 666-5107
Key: M.; Fr
Div. of Anthony Tarricone, Inc.
Bill Nolan, Gen. Mgr.
Nancy Herlihy, Off. Mgr.
John Egan, LPG Mgr.

■ **HAMILTON OIL CO.**
46 N. Third Street-Suite 708
Memphis, TN 38103
(901) 526-2161
Key: M.; Gw, Fw
B. B. Hamilton Sr., Pres. & CEO
Paula G. Dryden, Corp. Sec./Off. Credit Mgr.

■ **HANNEY FUEL OIL CO., INC.**
276 N. Henry St.
Brooklyn, NY 11222
(718) 383-4200
Key: M.; Fr, D
Thomas Hanney, Pres.
Raymond Hanney, Exec. VP

■ **HARRELL PETROLEUM CO.**
P.O. Box 9699
Corpus Christi, TX 78409
(512) 882-8833
Key: T. M.; G. D. L
T. A. Harrell Jr., CEO
Margaret Waller, Exec. VP
Alex Harris, Pres.
Lee D. Martin, VP, Mktg., Gen. Sls. Mgr.

■ **HARRIS ENTERPRISES INC.**
1717 S.W. Madison
Portland, OR 97205
(503) 222-4201
Key: M.; G. Fw, D. L
G. R. Harris, Pres.
Richard T. Harris, VP
David L. Harris, VP, Gen. Sls. Mgr.
Harold Nelson Jr., VP, Fin. & Admin.

■ **HARTFORD-WOOD RIVER TERMINAL, INC.**
P.O. Box 25
Hartford, IL 62048
(618) 254-2855
Key: M.; Gw, Fw, Dw
Robert W. Schimpf, CEO
R. William Schimpf, Pres.
Rex Mowry, Exec. VP

■ **HAWAIIAN INDEPENDENT REFINERY, INC.**
P.O. Box 3379
Honolulu, HI 96842
(808) 547-3222
Key: R.; M.; G. F. D. LPG
Sub. of Pacific Resources, Inc.
Subs: PRI South Pacific
PRI International, Inc.
Pacific Resources Terminals, Inc.
James F. Gany, Chmn.
Joseph A. Pelletier, Pres. & CEO
Anthony P. Towell, Pres.

■ **HIGHLAND PETROLEUM, INC.**
1075 South Yukon Street, #239
P.O. Box 261059
Lakewood, CO 80226-0215
(303) 987-0820
Key: M.; G. F.
Doug Baker, Pres.
Carl Baker, VP
Stephen Baker, Sec./Treas.

■ **HIGHWAY OIL, INC.**
1200 First National Bank Tower
Topeka, KS 66603
(913) 357-4161
Key: M.; G. D
Subs: Hi-Lo Oil Co., Inc.
A. B. Hudson, Chmn.
Tom G. Platts, Pres. & Gen. Cnsl.
Eugene H. Meyer, Exec. VP
Paul D. McFann, VP, Sec./Treas.
Richard B. Toner, VP
R. J. Gaffney, VP
Sandra J. Crouch, VP
John Peel, VP, Mktg.

■ **HILL PETROLEUM CO.**
P.O. Box 453
Kratz Springs, LA 70750
(318) 566-2301
Key: T. R. M.; Gw, Dw
Charles LeMaster, Treas.
C. E. Duyess, Pres.

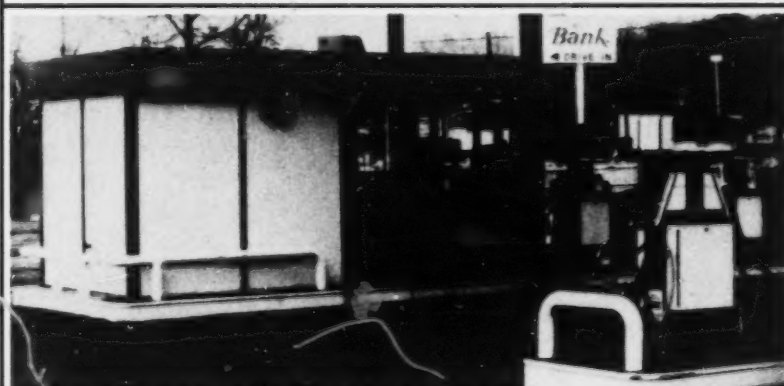
■ **ANGUS I. HINES, INC.**
P.O. Box 1080
Suffolk, VA 23434
(804) 539-2358
Key: T. M.; O-C-Stores; G. F. D. LPG, L
Subs: Franklin Oil Co.
Central Oil Corp.
Sentry Petroleum, Inc.
Service Gas Co.
Greensville Transport Co.
Angus I. Hines Jr., Pres.
Robert L. Story, VP
Larry L. Felton, Sec./Treas.
Douglas I. Phelps, Mgr., Svcs. & Fuel Oil Sls.
Lucy E. Parker, Credit Mgr.
T. Oscar Lamb, Opns. Mgr.
Mark Harrop, Supvr.

■ **Franklin Oil Co.**
P.O. Box 57
Franklin, VA 23851
Robert L. Story, Mgr.

■ **Central Oil Corp.**
P.O. Box 587
Rocky Mount, VA 24151
Richard P. Stone, Mgr.

■ **Central Oil Corp.**
Gretna, VA 24457
Mrs. J. W. Johnson, Mgr.

CUSTOM PRE-ASSEMBLED PUMP-ISLAND BUILDINGS



We provide high quality at a price you'll think is highly unlikely. These pump island booths are completely assembled to meet your requirements from a long list of available options. We can include heat, air, toilet, shelving and various security options including bullet resistant panels. Whether it's a small 4' x 4' booth on up to 12' x 40', they're all designed and built to be maintenance free for many years. Call or write for a quote or more information. If you're within 300 miles, we'll deliver on our own trucks.

DEALER AND DISTRIBUTOR INQUIRIES WELCOME.

KEYSTONE

STRUCTURES, INCORPORATED

38 South 19th Street - Philadelphia, PA 19103 - Telephone: 215/568-8150

Sentry Petroleum
5539 Farie St.
Norfolk, VA 23513
T. L. Hampton, Mgr.
Donald Pollard, Plant Mgr.

Service Gas Co.
P.O. Box 13
Wytheville, VA 24382
Johnson Crawford Jr., Pres.

Greenville Transport Co.
Box 1080
Suffolk, VA 23434
Thomas V. Arthur, Mgr.

HINKLE ENTERPRISES, INC.
P.O. Box 6366
Midland, TX 79711
(915) 563-2092
Key: M; G, D, L
Subs: Datafleet of the SW
Warfield Truck Terminal
Harry Hinkle, Pres.
Dick Dunbar, Sec./Treas.
Ted Bevers, Gen. Sls. Mgr.
Ed Roets, Truck Stop Mgr.

BARNEY HOLLAND OIL CO.
2809 N. Main St.
Fl. Worth, TX 75106-7199
(817) 626-1961
Key: M; Gw, F, Dw, L
Sub: Decatur Oil Co.
J. Walker Holland, Pres.
Lindsay B. Holland, VP
Barney B. Holland, VP
Priscilla B. Holland, Sec./Treas.
M. E. Downey, Sls. Mgr.
L. J. Sparvero, Comptroller

HOLLAND OIL CO.
686 E. North St.
Akron, OH 44305
(216) 434-4080

HOP-IN FOOD STORES
P.O. Box 260
345 Campbell Ave.
Roanoke, VA 24002
(703) 982-8460
Key: M; G, F, D
Sub: of Sil Corp. Ltd.
John M. Hudgins, Pres.
John DeWitt, Exec. VP & COO

HORKEY OIL CO., INC.
P.O. Box 2669
Lubbock, TX 79408
(806) 765-6661
Key: M; G, D, LPG, L
Joe R. Horkey, Pres. & CEO
Eugene Faulkner, VP
Ann R. Horkey, Sec./Treas.
Beth Gore, Comptroller & Asst.
Sec./Treas.

HORN DISTRIBUTING CO., INC.
P.O. Box 5013
Santa Fe, NM 87501
(505) 471-0512
Key: M; G, Dw, Lw
H. N. Wisenteiner, Pres.
J. W. Sellers, VP

HOTCHKISS INDUSTRIES INC.
P.O. Box 544
Fredericksburg, VA 22401
(703) 373-6000
Key: M; Fw
Charles S. Hotchkiss Sr., Pres. & CEO
Charles S. Hotchkiss Jr., Exec. VP
Pauline S. Hotchkiss, Sec./Treas.

E. F. HOUGHTON & CO.
Madison & Van Buren Aves.
Valley Forge, PA 19482
(215) 666-4000
Key: Prod-M; Indust. Oils & Chems.
Sub: E. F. Houghton, Canada Inc.
W. F. MacDonald Jr., Pres. & CEO
A. P. Jarman, VP, Sls.
F. H. Whitten, Adv. Mgr.

HUB-LANGIE FUEL CORP.
P.O. Box 22
Rochester, NY 14601
(716) 235-0940
Key: M; Gw, F, D, L
Subs: Arnold Oil Corp.
Dewey Jackson
William F. Huberlie, Pres. & Treas.
Adolf B. Zuch, Sec. & Controller
Kenneth A. Burchill, Opns. Mgr.

HUCK'S CONVENIENCE STORES
P.O. Box 385
Carmi, IL 62821
(618) 362-2334
Key: M; G, D
Sub: of Martin & Bayley Inc.
Bob Martin, Chmn.
Frank Bayley, Vice Chmn.
Steve Butler, Pres.
Randy Fulkerson, VP
Larry Kuykendall, Dir. of Petro.

HUDSON OIL CO. OF OKLAHOMA INC.
P.O. Box 35347
Tulsa, OK 74133
(918) 622-4186
Key: M; G
June Whitaker, Pres.
Winnie Hudson, Exec. VP
Diane Farris, VP

HUGHES OIL CO.
401 Brentwood Dr.
Daytona Beach, FL 32015
(904) 255-1111
Key: M; G, F, D, L
Subs: Self Service Oil Marketers, Inc.
Hughes Fuel Oil Co., Inc.
Reed B. Hughes, Pres.
Joseph Gentempo, VP, Gen. Mgr.
Thomas Burke, VP, Sls.
Lyle Brill, Controller
Steve Leahy, VP, Whlsl.

L. M. HUGHEY CO.
205 S. Hoover St.
Tampa, FL 33609
(813) 870-2323
Mike Hughey

HULL OIL CO.
P.O. Box 2266
Panama City, FL 32402
(904) 763-1746
Key: T, M; G, F, D, L
Deek Hull, Pres.
Anne Hull, VP
Nancy Hull, Sec./Treas.

HUNT OIL CO.
P.O. Box 1880
Tuscaloosa, AL 35403
(205) 758-6675
Key: T, R, M; G, F, D
Sub: of Hunt Oil Co. Inc., Dallas, TX
Chuck Tebo, Dir. Sls.
Don McNetts, Ref. Mgr.
Joe Bell, Supply & Distrib.
Margaret Harrell, Purch. Mgr.

HUNTLEY JIFFY, INC.
P.O. Box 876
Orange Park, FL 32067-8876
(904) 272-4540
Key: T, M; G, D
L. L. Huntley, Pres.
W. T. Huntley, VP
Ron Showat, Dir. Mktg.
Ron Tibbles, Dir. Gas Mktg.

A NAME YOU CAN COUNT ON

DREXEL BURNHAM LAMBERT

Where the expertise, knowledge and performance of experienced professionals yield excellence in service to the international petroleum industry.

Drexel Burnham Lambert's International Energy Group
under the direction of
Thomas McKiernan
Stephen J. McKiernan

60 Broad Street, New York, NY 10004 (212) 480-4283
U.S. Telex 126482 DREX Oil NYK
Int'l. Telex 177324 DREX Oil NYK
Winchester House, 77 London Wall, London EC2N 1BE
628-3200, Telex 884845

Offices in principal financial centers worldwide.

Drexel Burnham Lambert

Member of all major commodity exchanges worldwide.

HUSKY OIL MARKETING CO.
A Division of Husky Oil Ltd.
P.O. Box 6525, Station D
Calgary, Alberta, Canada T2P 3G7
(403) 298-6111
Key: I; G, F, D, LPG, L
Sub. of NOVA, An Alberta Corp.

INDEPENDENT STATIONS CO.
P.O. Box 2621
Harrisburg, PA 17105
(717) 939-1926
Key: M; Gr, Fr, Dr, LPR, Lr
John A. Arnold, Chmn.
Donald P. Cook, Pres.
Paul Ermlich, VP
Arthur Haffor, Gen. Mgr., Carlisle Div.
Draxel White, Gen. Mgr., Breezewood
Glenn Stephenson, Gen. Mgr.,
Clearfield
Ann M. Webb, Admin. Asst.

INDIANA FARM BUREAU
COOP. ASSN.
120 E. Market St.
Indianapolis, IN 46204
(317) 631-8361
Key: I; Gw, Fw, LPGw, Lw
Charles E. Kerber, Pres.
John H. Stearn, Sec.
Philip F. French, Exec. VP
Ronald Stover, VP

INTER-STATE OIL CO. INC.
P.O. Box 15099
Kansas City, KS 66115
(913) 371-3470
Key: O-Lubricants Mfr.; L
Sub: X-L Industries
Hugh H. Bruner, Chmn.
Ralph L. Heiss, Pres.
John Weber, VP, Oper.
John H. Krehmer, Sec.

IRVING OIL, LTD.
P.O. Box 1421
Saint John, New Brunswick,
E2L 4K1 Canada
(506) 532-2000
Key: R-M; G, F, LPG, L
A. L. Irving, Pres.
J. E. Irving, VP

J. & L. OIL, INC.
204 Rte. 45
Vernon Hills, IL 60061
(312) 367-3600
Key: M; Gr, Dr, Lr
Gene L. Wright, Pres.-CEO
Robert G. Elmore, Exec. VP
James Bishop, VP, Mktg.
Jack Sullivan, VP, Finance
David F. Wright, Sec.

J S & J SERVICE INC.
P.O. Box 4120
Ontario, CA 91761
(714) 986-5831
Key: M; Gr, Dr, Lr
Sub: Terminal Stations Inc.
Philip Keiber, Pres.
Steve Keiber, Sec.
Larry Emchick, VP & Treas.
June Valdez, Asst. Sec.-Office Mgr.

JACOBUS CO.
2323 N. Mayfair Rd.
Milwaukee, WI 53226
(414) 476-0701
Key: M; G, D, F, Lr
C. Jacobus, Pres.-CEO
K. Kuemmel, Sr. VP
H. Powers, VP, Whsl.
J. Suehlek, VP, Retail

JENNEY OIL CO.
250 Boylston St.
Chestnut Hill, MA 02187
(617) 332-4740
Key: O
Sub. of Boylston Lessors, Inc.
Robert M. Jenney, Pres.-CEO
C. W. Hill, Treas.
William Salem, Clerk

JESCO RESOURCES, INC.
P.O. Box 12337
North Kansas City, MO 64116
(816) 471-4590
Key: O; Lw
Sub: Jasco Lubricants Co.
R. S. Howell, Pres.
J. J. Peacock, VP, Sis.
J. S. Howell, Sis. Mgr.

JETERA TERMINALLING CORP.
(Formerly Hydrocarbon Trading &
Transport Co., Inc.)
17617 Aldine Westfield
Houston, TX 77073
(713) 821-0113
Key: T; M; Gw, Fw, D
Robert S. Bramlett, Chmn.-CEO
Gerald J. LaBouff, Pres.
Stanley H. Gwinn, VP
Kathy Kremer, VP, Supply & Distrib.

JOHNSON PRODUCTS, INC.
125 Glenn Street
Lawrence, MA 01843
(617) 685-7200
Key: M; G, D, L
Donald J. Moore, Pres.-Treas.
Edmund F. Xavier, VP
Philip E. Read, Controller

KAIBAB PETROLEUM CO.
Box 20506
Phoenix, AZ 85036
(602) 840-5555
Key: M; G, D, L
Sub. of Kaibab Industries
William Cassel, Pres.
W. Woodroffe, VP
A. V. Steen, VP
D. Church, Mgr., Lube Ariz.
J. Mozur, Mgr., Lubes, Rio Grande

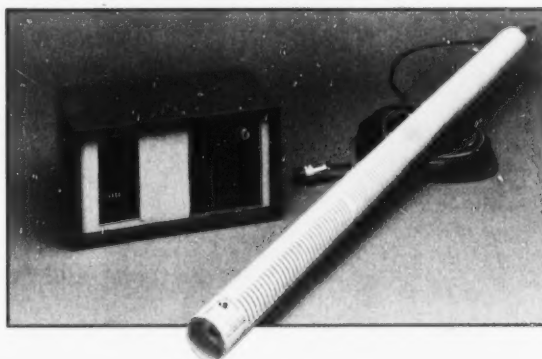
KELLAM ENERGY INC.
Accomack County
Belle Haven, VA 23306
(804) 442-5811
Key: T; M-Texaco; G, F, LPG, L, D
Lucius J. Kellam, Chmn.
Lucius J. Kellam, III, Pres.
H. Allen Floyd, Exec. VP, Mktg.
E. Polk Kellam Jr., Sec., Treas.
Stephen A. Storey, VP, Fin.
Robert L. Miller, Gen. Mgr. LPG

KELLETT OIL CO.
P.O. Box 889
Sikeston, MO 63801
(314) 471-4168
Key: M; G, D
Don E. Kellett, Pres.-CEO
Sandra Ottinger, Exec. VP

KELLEY-WILLIAMSON CO.
1132 Harrison Ave.
Rockford, IL 61101
(815) 397-9410
Key: M; G, D, F, L
Dorian Fisher, Pres.
John Griffin, VP
George Rolinger, Sis. Mgr.
Marlin Roberts, Mgr., Lube Oil

KENT OIL, INC.
P.O. Box 908001
Midland, TX 79708-8001
(915) 563-1620
Key: M; G, D, Lr
William B. Kent, Pres.
Robert C. Snoddy, VP & Gen. Mgr.
Arthur M. Sparks, VP, Opns.

We're Technically Better



Oil Recovery Systems' "CMS," the best continuous monitoring system, detects subsurface hydrocarbon leaks reliably.



☐ CMS incorporates our proven hydrocarbon detection principle.

☐ CMS manages Sensors that monitor in soils, sumps, double walled tanks, and on the water table.

☐ CMS controls Sensors at up to 16 locations.

☐ CMS monitors each Sensor independently and displays results at the Controller and Well Cap.

BEST AVAILABLE TECHNOLOGY

COST EFFECTIVE SECURITY

Send today for details.



OIL RECOVERY SYSTEMS, INC.
GROUNDWATER TECHNOLOGY

1420 Providence Hwy., Suite 128, Norwood, MA 02062 U.S.A., (617) 769-7600, telex 92-8420

Offices nationwide and overseas



KERR-MCGEE REFINING CORP.

P.O. Box 25861
Oklahoma City, OK 73125
(405) 270-1313
Key: I; G, F, D, LPG, L
Subs: Kerr-McGee Corp.
Subs: Cato Oil and Grease Co., Inc.
Southwestern Refining Co., Inc.
Triangle Refineries, Inc.
McClaran Jordan, Pres.
A. R. Gockel, Exec. VP
Morgan Moore, VP, Ref.
G. E. Tiernan, Controller
J. E. Warn, Dir. Plan. & Coord.
W. N. Pritchett, VP, Mktg.
J. C. McClendon, Gen. Sls. Mgr.
A. W. Babcock, Mgr. TBA and Lube Oil
Sls.
M. L. Alligier, Mgr., Fuel Sales
G. W. Williams, Mgr., Station Opns.
R. A. Owen, Mgr., Prod. Sup. &
Distrib.
J. R. Jaynes, Mgr., Whisl. Credit
A. H. McKinnon, Mgr., Retail Credit

Northern Resale Area

105 S. E. 45th Street
Oklahoma City, OK 73129
(405) 270-2031
R. L. Huff, Mgr.

Southern Resale Area

105 S. E. 45th Street
Oklahoma City, OK 73129
(405) 270-2024
S. A. Kearney, Mgr.

Refining Division

Morgan Moore, VP, Ref.

Wynnewood Refinery

Box 305
Wynnewood, OK 73098
(405) 665-4311
Walter Bare, Ref. Mgr.
Earl Allen, Supt., Opns.

Cotton Valley Refinery

P.O. Box 97
Cotton Valley, LA 71018
(318) 832-4237
C. E. Dykes, Plant Mgr.

Southwestern Refining Co., Inc.
(A wholly owned subsidiary of
Kerr-McGee Refining Corporation)

Box 217
Corpus Christi, TX 78408
(512) 884-8863
A. R. Gockel, Pres.
Morgan Moore, VP
B. E. Brown, VP, Gen. Mgr.
D. R. Oakes, VP, Asst. to Gen. Mgr.
T. S. Hoover, Mgr., Tech. Svcs.
Tom Sands, Mgr., Opns.
W. F. Fitzsimmons, Mgr., Maint.

Dubach Gas Processing Plant

P.O. Box 68
Dubach, LA 71235
(318) 777-3416
Bill Thacker, Plant Mgr.

Triangle Refineries, Inc.

(A wholly owned subsidiary of
Kerr-McGee Refining Corporation)
2211 Norfolk, Suite 1100
Houston, TX 77098
P.O. Box 366
Houston, TX 77253
(713) 831-4700
J. B. Saunders, Hon. Board Chmn.
Ray A. Freels, Pres.
Lewis H. Albright, VP, Terminal Opns.
& Credit
Harry W. Dudley, VP, Chem./Spec.
Mktg.

Frank A. Golemi, VP, Heavy Prod. &
LPGs
F. B. Henry Jr., VP, Mktg.
W. H. Hutchison, VP, Retail Sls.
Bill Thurman, VP, Sup. & Distrib.
J. E. Haire, VP, Trading & Sup.
Fred Capps, Mgr., Whisl. Sls.
Patrick Mountain, Credit Mgr.
Marlin Larson, Mgr. Nat'l. Accts.
Charles McComb, Mgr., Ping. &
Coord.
E. T. Sabin, Controller
Jerry D. Willis, Mgr., Mktg. Admin.
Ron Frisk, Mgr., Supply & Trading

Sales Offices

Specialty Products
3020 Knight Street, Suite 130
Shreveport, LA 71105
(318) 861-0954
W. W. Jones, Mgr., Spec. Prod.

Specialty Products

1701 Lake Avenue
Glenview, IL 60025
(312) 724-7372
Glen Asakias, Assoc. Sls. Rep.

Specialty Products

P.O. Box 47427
Doraville, GA 30362
(404) 457-5268
Tony Ostendorf, Assoc. Sls. Rep.

Wholesale Division Offices

Atlanta Division
P.O. Box 47427
Doraville, GA 30362
(404) 457-5268
Tom A. Morris Jr., Div. Mgr.

Goldboro Office

Mid-Towne Mall, Suite 204
200 West Ash Street
Greensboro, NC 27530
(919) 731-7722
Ken Jordan, Senior Sls. Rep.

Birmingham Division

P.O. Box 10625
Birmingham, AL 35202
(205) 925-6290
Sidney D. Smith, Div. Mgr.
Rod Parrish, Sls. Rep.

Chicago Division

1701 Lake Avenue
Glenview, IL 60025
(312) 724-7372
William A. Miles, Div. Mgr.

Houston Division

2211 Norfolk, Suite 1100
Houston, TX 77098
(713) 831-4705
Drug Elder, Div. Mgr.

San Antonio Office

4335 N.W. Loop 410, Suite 204
San Antonio, TX 78229
(512) 344-7208
Alan Dunlap, Sls. Rep.

Indianapolis Division

P.O. Box 34177
Indianapolis, IN 46234
(317) 291-0430
Bill Ryser, Div. Mgr.

Jacksonville Division

Box 3171, Station F
Jacksonville, FL 32206
(904) 355-8396
W. H. Reynolds, Div. Mgr.

Louisville Division

P.O. Box 16188
Louisville, KY 40216
(502) 447-1030

Mobile Division

P.O. Box 1546
Mobile, AL 36633
(205) 438-4736
Rudy Hill, Div. Mgr.

Nashville Division

P.O. Box 100433
Nashville, TN 37210
(615) 256-2477
Edgar Hypes, Div. Mgr.

Knoxville Office

6208 Baum Drive, No. 15
Knoxville, TN 37919
(615) 584-2263
Kyle Britt, Sls. Rep.

St. Louis Division

Drawer A, Mehlville Branch
St. Louis, MO 63129
(314) 892-0300

Shreveport Division

3020 Knight Street, Suite 130
Shreveport, LA 71105
(318) 861-0453
H. N. Wells Jr., Div. Mgr.
Jerry McWilliams, Sls. Rep.

Tampa Division

1111 North Westshore Blvd.,
Suite 509
Tampa, FL 33607
(813) 879-6400
Curtis Hill, Div. Mgr.

West Coast Division

444 West Ocean Blvd., Suite 510
Long Beach, CA 90802
(213) 590-8553
Mark Speer, Mgr., West Coast
Trading

Royal Petroleum, A Division of

Triangle Refineries, Inc.
42-20 Vernon Blvd.
Long Island City, NY 11101
(718) 784-6400
H. F. Presley, Gen. Mgr.
John Dalton, Asst. Gen. Mgr.
R. T. Shields, Mgr. Supply & Distrib.
P. K. Baird, Sr. Sls. Rep.
Jack Bradley, Sr. Sls. Rep.
Jack Kern, Sr. Sls. Rep.

Syracuse Division

4317 East Genesee St., Room 207
DeWitt, NY 13214
(315) 445-0606
Ron Criss, Sr. Sls. Rep.

Triangle Terminals

Annis Terminal
P.O. Box 3249
Oxford, AL 36203
(205) 831-0201

Atlanta Terminal

P.O. Box 47427
Doraville, GA 30362
(404) 457-5258

Birmingham Terminal

P.O. Box 10625
Birmingham, AL 35202
(205) 925-6290

Birmingham Terminal

Route 2
Mulga, AL 35118
(205) 436-3211

Chicago (Bell) Terminal

3741 South Pulaski Rd.,
Hawthorne Station
Chicago, IL 60623
(312) 254-2211

Chippewa Falls Terminal

P.O. Box 307
Chippewa Falls, WI 54729
(715) 723-2955

Choctaw Point Terminal

P.O. Box 1546
Mobile, AL 36633
(205) 433-1631

Clermont Terminal

P.O. Box 34177
Indianapolis, IN 46234
(317) 291-0430

La Grange Terminal

P.O. Box 180
La Grange, MO 63448
(314) 655-4707

Louisville Terminal

P.O. Box 16188
Louisville, KY 40216
(502) 447-1030

Lynn Park Terminal

Route 2
Cordova, AL 35550
(205) 463-7828

McFarland Terminal

P.O. Box 464
McFarland, WI 53558
(608) 222-3657

Mobile Terminal

P.O. Box 1545
Mobile, AL 36633
(205) 438-4736

Nashville Terminal

P.O. Box 100433
Nashville, TN 37210
(615) 256-2477

Niceville Terminal

P.O. Box 232
Niceville, FL 32578
(904) 676-5159

St. Louis Terminal

P.O. Drawer A, Mehlville Branch
St. Louis, MO 63129
(314) 892-0300

New Hyde Park Terminal

P.O. Box R 116
New Hyde Park, NY 11040
(516) 354-4545

Sewaren Terminal

P.O. Box 98
Sewaren, NJ 07077
(201) 634-3344

Long Island City Terminal

42-20 Vernon Boulevard
Long Island City, NY 11101
(718) 784-6400

KEY ENERGY ENTERPRISES, INC.

9250 Bay Plaza Blvd.
Suite 320
Tampa, FL 33619
(813) 623-5666
Key: M; G, D, L
Subs: Key Petroleum, Inc.
Key Food Marts, Inc.
Keystop, Inc.
Service Equipment Co. of Tampa
Key Wholesale, Inc.
Key Fuelstops, Inc.
B. Mack DeVine, Pres.-CEO
Jerry Lovenworth, Exec. VP-CFO
S. L. Hageman, VP, Admin.
Lawrence J. Keim, Treas.
W. M. "Skip" Borders Jr., VP, Opns.
David Caton, Controller
Mike Hilderbrand, Gen. Mgr., Florida

KICKAPOO OIL CO., INC.

215 E. Madison St.
Hillsboro, WI 54634
(608) 489-3631
Key: M; O-Transport; G, Fr, Dr, Lr
Sub: J.L. Ray
John Bosshard, Pres.
Wm. Bosshard, VP
David Jenkins, Gen. Mgr.
Geo. Osterhout, Groc. Div. Mgr.
Roger "Buck" Travnick, Ftl. Opns.

KIMBER PETROLEUM CORP.

333 Main Street, P.O. Box 700
Madison, NJ 07940
(201) 377-6000
Key: M; G, D
Warren S. Kimber Jr., Pres.
Barbara R. Kimber, VP
John DeZerga, VP
Carl Braun Jr., VP
Helene Sacharow, Sec.
Mildred Heiling, Treas.
William Price, Asst. Treas.
Warren S. Kimber III, Asst. Sec.

KIMBRO OIL CO.

P.O. Box 23089
Nashville, TN 37202
(615) 320-7484
Key: M; G, D, F
Harlon J. Kimbro Sr., Chmn.-CEO
Harlon J. Kimbro Jr., Pres.
William C. Kimbro, VP, Gen. Mgr.
David S. Kimbro, Treas.
Margaret M. Solomon, Sec.

KINGSTON OIL SUPPLY CORP.

N. B'way-P.O. Box 788
Port Ewen, NY 12466
(914) 331-0770
Key: M; G, F, D, LPG, L
Subs: Amos Post Co.
Paramount Oil Co.
Motzbro Corp.
Arthur P. Motzkin, Pres.-CEO
Alvin Motzkin, Sec.-Treas.
Joseph W. Benjamin, Pres.-Amos Post
Edward J. Weber, Gen. Mgr.
Barry J. Motzkin, Ad. Mgr.
David G. Motzkin, Eng.

KIRSCHNER BROS. OIL CO.

569 W. Lancaster Ave.
Haverford, PA 19041
(215) 527-4200
Key: M; G, F, D, L
Michael Kirschner, Pres.
Fred Kirschner, Exec. VP

KITTIE PETROLEUM, INC.

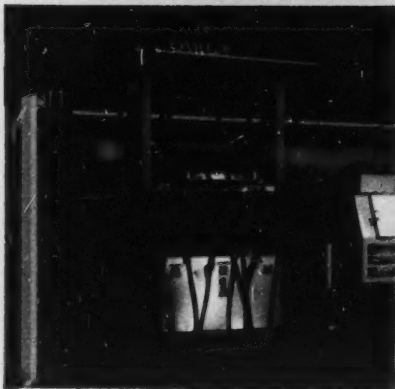
(Formerly River City Petroleum)
155 So. W.W. White Rd.
San Antonio, TX 78219
(512) 333-2510
Key: M; G, D, L
Dan Linnarty, Pres.
Walter Burnap, Chmn.
B. Max Burleson, VP, Retail
Les Kelly, Mgr., Whisl. Opns.

KEY

I..... Integrated
T..... Transporter
R-M..... Refiner-marketer
M..... Marketer
G..... Gasoline, wholesale/retail
F..... Fuel Oil, wholesale/retail
D..... Diesel, wholesale/retail
LPG..... Liquefied petroleum gas
L..... Lubricants, wholesale/retail
w..... wholesale only
r..... retail only

**"White took us from a lot of different looks,
to a look that makes a lot of difference."**

Keith Forsgren
President
Omega Oil Company



Case History: Omega Oil Company operates a chain of retail petroleum station/convenience stores in the Midwest.

Situation: The Omega chain includes a variety of structures and station layouts which made it difficult to design and implement a single graphic concept.

Graphic Solution: White Graphic Systems designed, manufactured, and installed contemporary graphics custom tailored for each Omega building, canopy, and pump.

Results: "We have seen an increase in customer traffic at our stations since the new graphics were installed," says Keith Forsgren, President of Omega Oil.

The White Difference: As the only single-source supplier for the design, materials, manufacture, and installation of petroleum station and convenience store graphics, White Graphic Systems has an advantage where price—and service—are concerned. Call today for a graphic analysis or return the attached postage-paid card. Our toll-free number is 1-800-554-9400. (In Texas, 1-817-261-1041.)

there is a difference...



White Graphic Systems

SUBSIDIARY, WHITE INDUSTRIES, INC.
Commercial Graphics Group
625 109th Street, Arlington, TX 76011

KOCH INDUSTRIES, INC.
P.O. Box 2256
Wichita, KS 67201
(316) 832-5500
Key: R, M; Gw, Fw, LPGw
Subs: Koch Refining Co.
Koch Fuels, Inc.

Koch Refining Co.
P.O. Box 43596
St. Paul, MN 55164
(612) 437-0700
Key: R, M; Gw, Fw, LPGw
W. W. Hanna, Chmn.
B. A. Paulson, Pres.
C. R. Swyers, Exec. VP
W. M. Hougland, Exec. VP

Koch Fuels, Inc.
P.O. Box 2256
Wichita, KS 67201
(316) 832-5210
J. W. Moeller, Chmn.
Ronald W. Howell, Pres.
Jeff Shaffer, Sr. VP

Birmingham, AL
#6 Office Park Circle, Suite 100
Birmingham, AL 35223
(205) 871-3335

Long Beach, CA
444 W. Ocean Blvd., Suite 1100
Long Beach, CA 90802
(213) 435-8457

London, England
Brook House, 113 Park Lane
London W1Y 3AJ
England
011-44-1-409-0121

Plantation, FL
8751 W. Broward Blvd., Suite 308
Plantation, FL 33324
(305) 475-7100

Tampa, FL
10014 N. Dale Mabry Hwy., Suite 101
Tampa, FL 33618
(813) 963-1445

Atlanta, GA
340 Interstate No. Parkway
Suite 440
Atlanta, GA 30339
(404) 952-0059

Augusta, GA
501 Greene St., Suite 326
500 Building
Augusta, GA 30901
(404) 724-2331

Oak Brook, IL
711 Jorie Blvd., Suite 250
Oak Brook, IL 60521
(312) 655-1798

Bettendorf, IA
4100 Elm Street
Bettendorf, IA 52722
(319) 359-1304

Niles, MI
2303 So. 3rd Street
Niles, MI 49120
(616) 683-5300

St. Paul, MN
778 Otto Avenue
St. Paul, MN 55102
(612) 228-4600

Springfield, MO
2 Corporate Centre, Suite 100
Springfield, MO 65804
(417) 882-9692

Lincoln, NE
304 South 13th
Lincoln, NE 68102
(402) 475-1284

Gloucester City, NJ
P.O. Box 31
Gloucester City, NJ 08030
(800) 456-6673

New York, NY
Box 091
8th Floor
Four World Trade Center
New York, NY 10048
(212) 446-0776

Singapore
No. 1, Scotts Road #22-12
Shaw Centre
Singapore 0822
(65) 7327555

Channahon, TX
18514-A Ocasavilla Rd.
Channahon, TX 77530
(713) 457-5530

Dallas, TX
2 Energy Square, Suite 1112
Dallas, TX 75206
(214) 369-3996

Houston, TX
333 Clay St., Suite 1300
Houston, TX 77002
(713) 651-0304

Newport News, VA
801 Terminal Avenue
Newport News, VA 23607
(804) 244-6545

Richmond, VA
1501 Santa Rosa Rd., Suite A-14
Richmond, VA 23288
(804) 282-6735

Green Bay, WI
2188 King James Drive
Green Bay, WI 54304
(414) 498-1540

Milwaukee, WI
Heritage Bank Building
9001 North 76th, Suite 303
Milwaukee, WI 53223
(414) 355-7607

KOCOLINE OIL CORP.
1725 East Tipton St.
Seymour, IN 47274
(812) 522-2224
Key: M; Fr, Dr, Lr
F. Pat Myers, Chmn.
Robert R. Myers, Pres.
Robert L. Prathers, Exec. VP
Gary F. Myers, Sr. VP

KRAUSE GENTLE OIL CORP.
Box 537
Hampton, IA 50441
(515) 456-4703
Key: M; G, F
Subs: Solar Transport
Krause Gentle Oil Corp.
North Iowa Oil Co.
Tri-Iowa Oil Co.
Allison Corp.
Chieftain Corp.
T. S. Gentle, Chmn. & Sec.
W. A. Krause, Pres. & CEO
D. D. Van Horn, VP
R. F. Jackson, VP
Keith C. Conover, Controller
T. J. Wolin, Sls. Dir.

THE KUNZ OIL CO.
5200 Eden Circle
Edina, MN 55438
(612) 920-6373
Key: M; G, D
Walter M. Kunz Jr., Pres.
James E. Ford, VP
Eugene Lovimen, VP
Dirk P. Vogel, Sec. Treas.
Pat Doubek, Sls. Mgr.

KWIK SHOP, INC.
P.O. Box 1927
Hutchinson, KS 67504-1927
(316) 669-4504
Key: M; Gr, Dr, Lr
Sub: of Dillon Companies Inc.
Robert L. Meyers, Pres.
Gary Pfannenstiel, Mktg. Dir.
Rick Krafets, Petro. Dir.
Steve Smith, VP. Opns.
David Ciesewski, Real Estate Dir.
Bill Bell, Exec. VP
Clifford Dick, Mgr., Petro. Equip.

La GLORIA OIL & GAS CO.
P.O. Box 2521
Houston, TX 77252
(713) 799-3131
Key: I; Gw, Dr, Fw, LPGw
Sub: of Texas Eastern Corp.
Sub: McKunney Pipeline
M. D. Burke, Pres.
R. T. Blanchard, Exec. VP
L. B. Gatewood, VP. Manuf.
D. W. Worden, Gen. Mgr., Mktg.
A. N. Bertley II, Gen. Mgr., Supply & Distrib.

No. Little Rock, AR 72117
P.O. Box 3352
(501) 949-7115

Seymour, IN 47274
P.O. Box 401
(812) 445-3663
C. L. Basil, Sls. Supv.

Tyler, TX 75701
P.O. Box 840
(214) 595-4511
C. W. Mason, Sls. Supv.
James Gregory, Sls. Rep.

Mobile, AL
808 Downtowner Boulevard
Suite D
R. L. Pittman, Sls. Supv.

LAKE SIDE REFINING CO.
P.O. Box 909
Kalamazoo, MI 49005
(616) 343-1574
Key: T, R, M; Gw, Fw, Dw
Marvin Fleischman, Pres.
Willis E. Perigo, Exec. VP

LAKETON REFINING CORP.
P.O. Box 1465
Douglasville, GA 30133
(404) 949-3333
Key: R, M; Fw
Sub: of Young Refining Corp.
Subs: Trico Pipeline Co.
James P. Young, Pres.
John K. Hudson, Exec. VP
Charles E. Young, VP
Joseph P. Rebore, Plant Mgr.

LAND O' LAKES, INC.
800 53rd Ave. NE
P.O. Box 1395
Minneapolis, MN 55440
(612) 574-7133
Key: I, T, R, M; G, D, F, LPG, L
Subs: Petroleum Resources Co.
Claire Sandness-Chmn.
Ralph Holstad, Pres.
Duane Halverson, Group VP
Don Kirksey, VP. Mktg.
Larry Burkett, VP. Sls.
Rich Burton, Adv. Mgr.
Lee Morin, Mgr., Refined Fuels
Foster Hemstock, Mgr., LPG
Jeb Vachuska, Mgr., TBA Lubes

LANDSEA OIL CO.
1671 Reynolds Ave.
P.O. Box 19603
Irvine, CA 92714
(714) 250-0940
Key: M, O; Gw
Donald L. Olson Jr., Pres.
Geary E. Burghoff, Exec. VP
Morse C. Deming, VP. Supply Mktg.
Robert Gardiner, West Coast Supply Coord.
Terry M. Pinney, Gulf Coast Supply Coord.
David Tracht, VP. Terminals Opns.

LANK-COMO OIL CO.
P.O. Box 21340
Fort Lauderdale, FL 33335
(305) 524-7961 Broward
(305) 945-3889 Dade
Key: M; G, F, D, L
Myers Hall, Pres., Como Oil Co. & Gen. Mgr.
Lank-Como Oil Co.
Jerry Barber, Mgr., Svc. Dept.
Lank-Como Oil Co.
William Lank Sr., Pres., Lank Oil Co.
William Lank Jr., VP. Lank Oil Co.
Rodney Heetland, VP. Lank Oil Co.
William Lank Jr., Gen. Mgr., Lank-Como Oil Co.

LAWES COAL CO.
Sycamore Ave.
Shrewsbury, NJ 07701
(201) 741-6300
Key: M; Gr, Dr, Fr, Lr
Donald E. Lawes Jr., Pres. & CEO
Donald E. Lawes III, Exec. VP

CARLOS R. LEFFLER
Box 278
Richland, PA 17087
(717) 899-2105
Key: T, M; G, D, F, L, LPG
Carlos R. Leffler, Pres.
John Byler, Exec. VP
Robert Blecker, Exec. VP
Donald Noll, TBA Mgr.
Patrick Castagna, Admin. VP
Armon Martin, Sls. Rep.
Dave Montroy, Credit Mgr.
Michael Bollinger, Mgr., Opns. & Trans.
Paul Hadin, Lube Eng.

LEHIGH OIL CO. LTD. PARTNERSHIP
One Terminal Way
Norwalk, CT 06360
(203) 889-1311
Key: M; Fr, Dr
Thomas Castle, Pres.
Peter H. Castle, VP. Sec.

J. A. LEONE & SONS
444 Merrimack St.
Methuen, MA 01842
(617) 987-7101
Key: M; Fr
Joseph A. Leone III, Pres. & CEO
Kenneth Leone, Treas.
Donald E. Beets, Credit Mgr.

LE PAUL OIL CO.
P.O. Box 578
Troy, OH 45373
(513) 335-5631
Key: M; G, D
Frank Shapiro

LIDO CO. OF NEW ENGLAND
New Zealand Rd.
Seabrook, NH 03874
(603) 474-5551
Key: M; G, D
Carl A. Pescosolido, Pres. & CEO
Wm. B. Pescosolido, VP. Gen. Sls. Mgr.

LION OIL CO.
1000 McHenry St.
El Dorado, AR 71730
(501) 862-8111
Key: I; G
L. B. Lampton, Pres.
Lee Lampton, Mgr., Whol. Sls.
Gerald Williams, Mgr., Sup. & Distrib.

LITTLE AMERICA REFINING CO.
P.O. Box 1529
Cheyenne, WY 82001
(307) 634-2771
Key: R, M; G, F
R. E. Holding, Pres. & CEO
Don Steuwe, VP. Ref.
M. L. Rensick, Mgr., Fuel Oil & Asphalt

THE LUBRIZOL CORP. FUEL PRODUCTS GROUP
29400 Lakeland Blvd.
Wickliffe, OH 44092
(216) 943-4200
Key: O-fuel additives
Thomas E. Johnston, Dir.
Joseph E. Gross, Sls. Mgr.
Robert C. Gross, Tech. Mgr.

LYDEN OIL COMPANY
739 Andrews Avenue, P.O. Box 1854
Youngstown, OH 44501
(216) 744-3118
Key: M; G, F, D, L
W. G. Lyden Jr., Chief Exec. Off.
William Geoffrey Lyden III, VP
Mark E. Lyden, VP. Sls.
Breen P. Lyden, VP. Sls.

MACMILLAN RING-FREE OIL CO.
90 Park Ave.
New York, NY 10016
(212) 867-0250
Key: R, M; Gw, F, Dw, L
Subs: Southern Calif. Ref. Co.
Waller Petro. Co.
MacMillan Petroleum (Arkansas) Inc.
Shaheen Natural Resources Co.
John M. Shaheen, Pres. & CEO
Wm. Soudnette Sr., VP
L. F. Marino, VP. Mktg.
Jesse Taub, VP
Dominick C. Perla, Brand Mgr.

MAIN BROS. OIL CO.
318 Delaware Ave.
Delmar, NY 12054
(518) 439-7605
Key: M; G, Fr, D, L
Wm. Vincent, Pres. & CEO
Clark E. Zeh, Exec. VP. Treas.
Ronald Van Ronne, Sls. Mgr.

MAJOR BRANDS DISTRIBUTING
600 South Main Street
Butte, MT 59701
(406) 723-5419
Key: T, M; G, F, D, LPG, L
Thomas F. Kenneally, Pres.
Jim M. Kenneally, VP. Purch.
Dan J. Kenneally, Gen. Mgr.
Kevin Kenneally, Opns. Mgr.

MANASSAS ICE & FUEL CO., INC.
5009 Center Street
Manassas, VA 22110
(703) 366-3121
Key: M; G, F, D, L
Subs: MIFCO, Inc.
Manassas Frozen Foods
Harry J. Parrish, Chmn.
Harry J. Parrish II, Pres.
Mattie C. Parrish, VP
Frank J. Parrish, VP
Mabel C. Black, Credit Mgr.
Guy A. Guiffre, Controller
Guy P. Anderson, Plant Mgr.
Stanley Fowler, Plant Mgr.

MAPCO PETROLEUM INC.
5820 Charlotte Pike, P.O. Box 22298
Nashville, TN 37202
(615) 352-8180
Key: M; Gr. Dr.
Sub. of MAPCO, Inc.
Muri Kennamore, Gen. Mgr.
Noble Cummings, Real Estate Mgr.
James Slickel, Mktg. Mgr.
James R. Webb, Mgr., Admin.

MAPCO PETROLEUM INC.
P.O. Box 2930
Memphis, TN 38101-2930
(901) 774-3100
Key: R; Gw. Fw. Dw
Sub. of MAPCO, Inc.
R. G. Alexander, VP, Ref.
Larry Smith, Admin. Mgr.
L. G. Diehl, Gen. Mgr., Opns.
J. W. Huggins, Eng. Mgr.

MARATHON PETROLEUM COMPANY
539 South Main Street
Findlay, OH 45840
(419) 422-2121
Key: R, M; G, F, D, LPGw, L
J. L. Frank, Pres.
G. N. Nicholson, VP, Mktg.
W. E. Lindsey, Pric. & Alloc. Mgr.
W. E. Spears, Real Estate Mgr.
M. J. Kidd, Mgr., Retail Mktg.
E. S. Markel, Sis. Mgr., Retail Mktg.
G. R. Fisher, Adv. Mgr., Retail Mktg.
G. L. Cartwright, Related Merch. Mgr., Retail Mktg.
C. E. Browne, Opns. Mgr., Retail Mktg.
R. E. White, Mgr., Whisl. Mktg.
J. L. Goodhue, Sis. Mgr., Consumer Whisl. Mktg.
S. J. Oakes, Sis. Mgr., Heavy Oils & Propane, Whisl. Mktg.
G. S. Wassum, Mgr., Mktg. Opns.

J. McCaffrey III, Prod. Sup. & Distrib. Mgr.
W. E. MacDonald, Lub. & Svcs. Mgr.
R. E. Lodico, Tech. Svcs. Mgr.
G. L. Wieland, Mktg. Engr. Mgr.
A. J. Moorhead, Term. & Transp. Mgr.

Atlanta, GA 30347
1140 Hammond Drive, N. E.
C. E. Pike, Southern Reg. Mgr., Whisl. Mktg.

Park Ridge, IL 60068
444 North Northwest Highway
R. L. Bell, Northern Reg. Mgr., Whisl. Mktg.

Southfield, MI 48037
26406 Lahser Road
H. W. Collins, Midwest Asphalt Sis. Mgr., Whisl. Mktg.

Birmingham, MI 48012
2205 Holland Avenue
A. R. Charnes, Mgr., Detroit Fuel Oil Sis., Retail Mktg.

Champaign, IL 61820
2407 South Neil Street
J. F. Grant, District Mgr., Retail Mktg.

Columbus, OH 43228
4125 Fisher Road
G. A. Risser, District Mgr., Retail Mktg.

Southfield, MI 48037
25400 Lahser Road
W. T. Slade, District Mgr., Retail Mktg.

Indianapolis, IN 46224
1304 Olin Avenue
R. W. Povolock, District Mgr., Retail Mktg.

MARTIN OIL MARKETING, LTD.
4501 West 127th Street
Alsip, IL 60658
(312) 385-6500
Key: M; O-Blending; G, F, D
Carl C. Greer, Pres.
J. Kirkland Greer II, VP, Sup. & Transp.
R. Gene Voyles, VP, Retail Opns.
Thomas A. Floyd, VP, Fin., Treas.

MAUGER & CO.
38 Springfield Rd.
Aldan, PA 19018
(215) 622-3300
Key: M; G, F, D, LPGw, L
Sub: Simpson Oil Corp.
Clyde A. Mauger Jr., Pres. & CEO
Clyde A. Mauger III, Exec. VP
Phillip Robinson, Treas.

McCALL OIL & CHEMICAL CORP.
808 S.W. 15th
Portland, OR 97201
(503) 228-2606
Key: M; G, F, D, L
Subs: Great Western Chemical Co.
Chemex
R. H. McCall, Pres. & CEO
Jim Wier, VP, Mktg.
Dean Prusse, Supply Mgr.
Jim Charrere, Mgr., Resales Sis.
Fred Caffey, Mgr., Commercial Sis.
Bob McClarey, Mgr., Washington Sis.
Bernie Fisher, Mgr., Terminals

MCDOWELL OIL SERVICE INC.
223 W. 8th St., P.O. Box 29
Bloomsburg, PA 17815
(717) 784-6891
Key: M; G, Fw, Dw
John L. McDowell III, Pres. & CEO
Larry H. Moss, VP

McLELLER OIL, INC.
P.O. Box 2094
Kalamazoo, MI 49003
(616) 343-7677
Key: M; G, F, D, L
Robert McLeller, Pres.
Peter Buis, VP

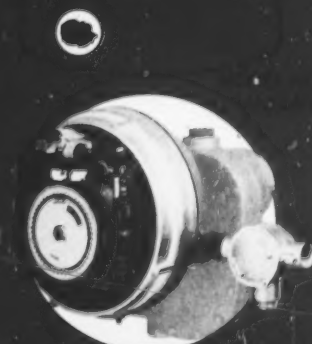
MEENAN OIL CO., INC.
6800 Jericho Tpke. Box 100
Syosset, NY 11791
(516) 364-9030
Key: F, D
William F. Kenny III, Pres.
S. R. Orczyk, VP, Opns.
P. A. Vermeylen, VP, Finance

MERCHANTS OIL
105 S. Cherokee St.
Denver, CO 80223
(303) 733-4627
Key: M; G, D, L
Geo. W. Calkins, Pres.
B. H. Calkins, Exec. VP

MERCURY OIL CO.
80 Burbank Rd., P.O. Box M
Wethersfield, CT 06109
(303) 563-0302
Sub. of Northeast Petroleum, Chelsea

PLAIN & SIMPLE

CALL ENRAF



GO FOR THE ORIGINAL...



**ENRAF
NONIUS**



Service Stations and Counter Top Merchandising... A Profitable Combination!



Kevin Zalak
Owner
Joe's Mobil Station
Centereach, New York

"I started selling candy with the counter top merchandiser. My sales have expanded so much that I now have a complete candy section as well as the counter top display. Impulse sales and profits are still growing and I'm very pleased with the results."

Lew Helfstein
President
Golden Tobacco, Inc.
Hauppauge, New York



"The counter top merchandiser is a way I can increase my candy sales and help retailers do the same. I am convinced it is mutually beneficial to all concerned and I support the concept 100%. My sales force will continue to provide the counter top merchandiser as a service to all my customers."

**Write
Today . . .**

For more information on how to obtain a counter top display,
mail this coupon to M&M/MARS, Sales Division,
High Street, Hackettstown, NJ 07840

☐ Please have an M&M/MARS associate
contact me as soon as possible

Name _____ Title _____

Company _____ No. of Locations _____

Address _____

City _____ State _____ Zip _____

Telephone _____



a division of Mars, Incorporated HACKETTSTOWN, NEW JERSEY 07840

MERIT OIL CORP.

551 W. Lancaster Ave.
Haverford, PA 19041
(215) 527-7900
Key: M; Gr; Dr
Sub. of Meadville Corp.
Joseph M. Jerome, Pres. & CEO
Ivan H. Gabel, Exec. VP & COO
Leonard E. Golmar Sr., VP, Fin. & Treas.
Richard E. Pate, VP, Sls.
Charles Clayton Jr., Dir., Merch. & Prod. Devel.

S. P. Russo, Real Estate Mgr.
Richard A. Lucas, Merch.
Marton Craine, Asst. Sec. & Counsel
James F. Parsons, Controller, Asst. Treas.
Robert M. Harding, Personnel & Public Aff. Mgr., Asst. to Pres.
S. Kirkland Bass, Supply & Distrib. Mgr.
Dominick DeBenedictis, Engr. Mgr.

New England Division

274 Main St.
Reading, MA 01896
(617) 942-1096
George Steininger, Div. Mgr.
Gary Jerome

New York Division

14 Front St.
Hempstead, NY 11550
(516) 292-1000
C. Leon Carruthers, Div. Mgr.
Robert Williams, Sls. Mgr.
Charles Blanchet, Sls. Mgr.

MERRITT TRUAX INC.

P.O. Box 2099
Salem, OR 97308
(503) 588-0455
Key: M; G; F, D, LPG, L
Michael Truax, Pres.
Peter F. Meyer, VP, Heating Oil Mktg.
Mrg., Gen. Opls. Mgr., Consumer Mktg. Mgr.
James Wechter, VP, Controller
Tim Jansen, VP, Data Proc. Mgr.
Dianne Munley, VP, Credit Mgr.
Cynthia R. Gruber, VP, Franchise Relations
Phil Murray, VP, Controlled Mktg. Mgr.
Paul Farrell, VP, Reseller, Mktg. Mgr., Transport Mgr.

MFA OIL COMPANY

Box 519, 200 South 7th Street
Columbia, MO 65205
(314) 442-3171
Key: M; G; F, D, LPG, L
Subs: MFA Petroleum Company
Midstate Oil Company
Dale H. Creach, Pres.
John Ledgerwood, VP, Mktg.
William Thomas, Mgr., Acct.
J. S. Cunningham, VP, Admin.
Paul Dittmer, VP, Opls.
William Harris, Mgr., LPG Sls.

MICO OIL CO.

P.O. Box 2423
Shawnee Mission, KS 66201
(913) 236-4142
Key: M; Gr
M. W. Hudson, Pres. & CEO
William J. Peebles, Exec. VP
Mike Smittle, Sec./Treas.

MID-CONTINENT SYSTEMS, INC.

P.O. Box 1370
310 Mid Continent Plaza
West Memphis, AR 72301
(501) 735-4295
Key: R; M, O-Terminal Opls.; G, D, L
D. G. Seago Jr., CEO
Tom Lawhorn, Exec. VP
Robert Craig, VP, Retail Sls.
Garry Kyzar, Gen. Sls. Mgr.
Marvin Shoemaker, Real Estate

MID-MISSOURI OIL CO.

P.O. Box 187
Eldon, MO 65026
(314) 392-5825
Key: M; G; F, L
Clark F. Houghton, Pres.
Wayne E. Compton, VP, Sec.
O. F. Houghton, Treas.
Jerry Killian, Retail Sls. Mgr.
Mike Herman, Offic. Mgr.

MID-STATES PETROLEUM

2146 Livernois Ave.
Troy, MI 48064
(313) 520-3577
Subs: Capitol City Oil Co.
Markline Oil Co.
Spade Fuel Oil & Supply
Save-U Stations, Inc.
R. H. Butler Jr., Pres. & CEO
J. M. Butler, Exec. VP
H. P. Butler, Exec. VP
D. D. Darling, Gen. Sls.
J. J. Hester, Supply & Distrib. Mgr.
B. R. Hardin, Opls. Mgr.

MIDWEST PETROLEUM CO.

6760 Southwest
St. Louis, MO 63143
(314) 647-5550
Key: M; G; D, L
Sub: Bolch Oil Co.
Louise M. Levin, Pres.
Bud Levin, Exec. VP, Mktg.
Bill Hopkins, Gen. Sls. Mgr., Trans. Mgr.
Lee Goddard, Opls. Mgr.

MILDER OIL CO. INC.

P.O. Box 3707
Omaha, NE 68103
(402) 342-2111
Key: M; Gw, F, Dw, LPGw, Lw
M. H. Milder, Pres. & CEO
M. H. Milder II, Exec. VP
Thomas Bird, VP, Gen. Mgr.

MILLER & HOLMES, INC.

501 Lafayette Road
St. Paul, MN 55101
(612) 224-5874
Key: M; Gr, Fr, Dr, Lr
Gerald T. Peterson, Pres.
Anthony W. Holmes, VP
Berton M. Kettler, VP

MILLER ENTERPRISES, INC. D/B/A

Handy Way Food Stores
331 Central Ave.
Crescent City, FL 32012
(904) 698-2231
Key: M; Gr, Fr, Dr, Lr
Thomas Miller, Pres.
Howard Phillips, VP
Chalker Fringie, VP, Convenience Store Opls.
Daniel L. Miller, Dir., Gas. Opls.
Dan Doran, Personnel Dir.
Jeri Vanden Eynden, Mktg. Dir.
Joe Miller, VP, Store Engr.

MILLER OIL CO.

150 S. Main St. Box 4587
Norfolk, VA 23523
(804) 543-5751
Key: M; G; F, D, L
Subs: Miller Corp. South
A. C. Miller, CEO
J. G. Miller, Whisl. Mgr.
F. C. Hodgson, S/S Mgr.
W. J. Downie, HVAC Mgr.

MINI MART INC.

P.O. Box 3259
Casper, WY 82602
(307) 286-1230
Key: M; G; D
C. Rodney Kinskey, Pres.
Robert G. Fowles, Exec. VP
Ron L. Terrell, Petro. Mktg. Mgr.

MISSOURI TERMINAL OIL CO.

3854 S. 1st St.
St. Louis, MO 63118
(314) 351-0900
Key: M; G; L
Donald P. Plummer, Pres.
Gene A. Warmann, VP

MOBIL OIL CORPORATION

U.S. Marketing & Refining Division
3225 Gallows Road
Fairfax, VA 22037
(703) 849-3000
Key: I; G, F, D, L
Sub. of Mobil Corp.

Mobil Corp.

150 E. 42nd St.
New York, NY 10017
(212) 883-4242
Rawleigh Warner Jr., Chmn. & CEO
Allen E. Murray, Pres.

Mobil Oil Corp.

Marketing & Refining Division
150 E. 42nd St.
New York, NY 10017
(212) 883-4242
P. J. Hoenmans, Pres.

Mobil Oil Corp.

U.S. Marketing & Refining Division
3225 Gallows Road
Fairfax, VA 22037
(703) 849-3000
R. G. Weeks, Exec. VP

U.S. Marketing

J. B. Hinton, VP, Gen. Mgr., Mktg.
H. Hokamp, Gen. Mgr., Resale Mktg.
P. E. J. Engel, Mgr., Retail
E. M. Layman, Mgr., Whisl.
D. R. Hayward, Gen. Mgr., Lube & Comm. Bus.
D. H. Cameron, Mgr., Lube Ping. Engr. & Product Support
G. D. Madden, Mgr., Lube & Comm. Sls.
J. E. McKeevar, Gen. Mgr. Opls.
K. C. Esty, Gen. Mgr., Mktg. Svcs.
G. S. Spiess, Mgr., Adv.
W. D. Manz, Gen. Mgr., Ping. & Fin. Analysis
H. J. Guibrandsen, Mgr., Bus. Devel.

Eastern Resale Region

#10 Executive Mail-Bldg.
Valley Forge, PA 19482
H. E. Dransfield, Gen. Mgr.
T. D. Anderson, Resale Mgr., South
T. B. Newman, Resale Mgr., North

Western Resale Region

4600 Woodfield Dr.
Schamburg, IL 60196
R. J. Niemeyer, Gen. Mgr.
R. J. Downing, Resale Mgr., Central
M. D. DiMezza, Resale Mgr., West

Headquarters Comm. Sales

3225 Gallows Road
Fairfax, VA 22037
K. R. Fernlund, Mgr.

Resale Lubricants Sales

3225 Gallows Road
Fairfax, VA 22037
E. D. Bryant, Mgr.

MOHAWK OIL CO. LTD.

#325-6400 Roberts Street
Burnaby, B.C., Canada V5G 4G2
(604) 299-7244
Key: I, M; G, Fw, D, LPG, L
Sub. of Mohawk Oil Canada Ltd.
Don Skagen, Pres.
Mac Christie, Sr. VP, Mktg.
Don Stuart, VP, Mktg. Svcs.
Gary Cartwright, R.G.M., Pacific Region
John Punch, R.G.M., Prairie Region
John Gran, Mgr., Adv. & Promo.

MONARCH OIL & SUPPLY CO.

P.O. Box 800
Gary, IN 46401
(219) 886-9218
Key: O-Distributor; G, F, D, L
Robert B. Bailey, Pres. & CEO
Fred T. Stinson, VP

MOORE & MUNGER, INC.

140 Sherman Street
Fairfield, CT 06430
(203) 259-7861
Key: M; Fw, Dw, Lw
Subs: Cross Oil & Ref. Co.
Cross Development Co.
Moore & Munger Marketing, Inc.
S. T. Van Esselwyn, Chmn.
David A. Rosow, Pres. & CEO
Victor C. Braun, Group VP
Wayne G. Granquist, Group VP
A. W. Clinger, VP, Mktg.
Harry M. Farnham, VP, Res.
Henry L. Levkoff, Asst. Pres.

E. L. MORGAN CO.

512 E. Main-P.O. Box 1545
Jackson, TN 38302
(901) 424-3545
Key: T; M; G, F, D; L
John E. McCutchen, Pres. & CEO
Mrs. Kate D. Morgan, VP
Joe Cheatham, Mgr., Retail Sls.
Clotis Hill, Mgr., Lube Sls.
Donna Maxwell, Offic. Mgr.

MUNFORD INC.

1860-74 Peachtree Rd. N.W.
P.O. Box 7701-Station C
Atlanta, GA 30357
(404) 352-6641
Key: M; Gr
Subs: World Bazaar
Majik Market
Craft Bazaar
Steve Daniel, VP, Real Estate
Bob Cox, VP, Personnel Mgmt.
Frank Savini, Majik Mkt.

MURPHY OIL USA, INC.

200 Peach
El Dorado, AR 71730
(501) 862-6411
Key: I; G, F, D, LPGw
Sub. of Murphy Oil Corporation
Charles H. Murphy Jr., Chmn.
Robert J. Sweeney, Pres. & CEO
Jack W. McNutt, Exec. VP
John L. Solomon, VP, Mktg.
Paul C. Bilger, VP, Mktg.
Jack W. Brewer, Sls. Mgr.
J. Maurice Peel, Mgr., Mktg. Opls.
T. M. Murphy, Mgr., Mktg. Svcs.
Frank E. Massey, Mgr., Terminal Opls.
Graydon T. Simmons, Mgr., Prod. Supply
Claiborne P. Deming, Asst. Mgr., Prod. Supply
Bob J. Thompson, Credit Mgr.

Atlanta Georgia Region

1867 Independence Square
Suite 100
P.O. Box 588303
Dunwoody, GA 30338
(404) 393-8492
James F. Rawlings, Mgr.

Minneapolis, Minnesota Region

4600 West 77th St.
Suite 304
(612) 635-3611
John E. Dardy, Mgr.

MUSKET CORPORATION

P.O. Box 26210
Oklahoma City, OK 73126
(405) 751-9000
Key: M; Gr, Dr, L
Tom E. Love, Pres. & CEO
L. M. Dillard, VP
Terry Ross, VP
Jim R. Rager, VP

NATIONAL CONVENIENCE STORES, INC.

P.O. Box 758
Houston, TX 77001
(713) 863-2200
Key: M; Gr, Dr
Sub: Kempro Petroleum Co.
V. H. Van Horn, Pres.
E. Swens, Sr. VP, Corp. Devel.
J. R. Welch, Sr. VP, Stores
R. G. Chramosta, Gas. Opls. Mgr.

NATIONAL COOPERATIVE

REFINERY ASSOCIATION
P.O. Box 1404
McPherson, KS 67460
(316) 241-2340
Key: I; Gw, Fw, Dw, LPGw
Member-Owners: Farmland Industries Inc.
Farmers Union Central Exchange Inc.
Growmark Inc.
Land O'Lakes Inc.
MFA Oil Co.
Jayhawk Exploration Inc.
Clear Creek Cos.
Jayhawk Pipeline Corp.
Sease Pipeline Co.
Seaway Pipeline Inc.
Agri-Petro International Inc.
Larry E. Williams, Pres. & CEO
R. A. (Ron) Berke, VP, Supply & Transp.
C. W. (Bill) McNaul, Distrib. Mgr.
Melvin R. Bergen, Prod. Invoicing Supvr.

NATIONAL OIL & GAS INC.

P.O. Box 476
Bluffton, IN 46714
(219) 824-2220
Key: M; G, F, D, L
William Moser, Pres.
Wm. Gene Moser, Exec. VP
Ed Alderding, VP, Sls.
T. G. Gerber, Treas.
J. D. Kipler, Sec., Controller

KEY

I..... Integrated
T..... Transporter
R-M..... Refiner-marketer
M..... Marketer
G..... Gasoline, wholesale/retail
F..... Fuel Oil, wholesale/retail
D..... Diesel, wholesale/retail
LPG..... Liquefied petroleum gas
L..... Lubricants, wholesale/retail
w..... wholesale only
F..... Retail only

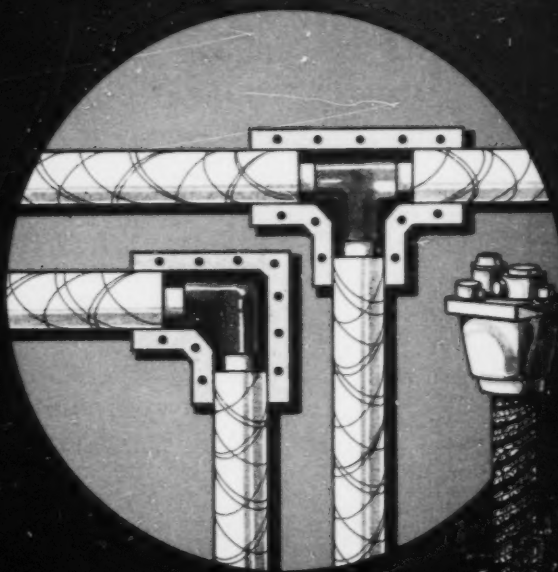
SECONDARY CONTAINMENT PIPING

RED THREAD® II PIPE FROM A. O. SMITH-INLAND...

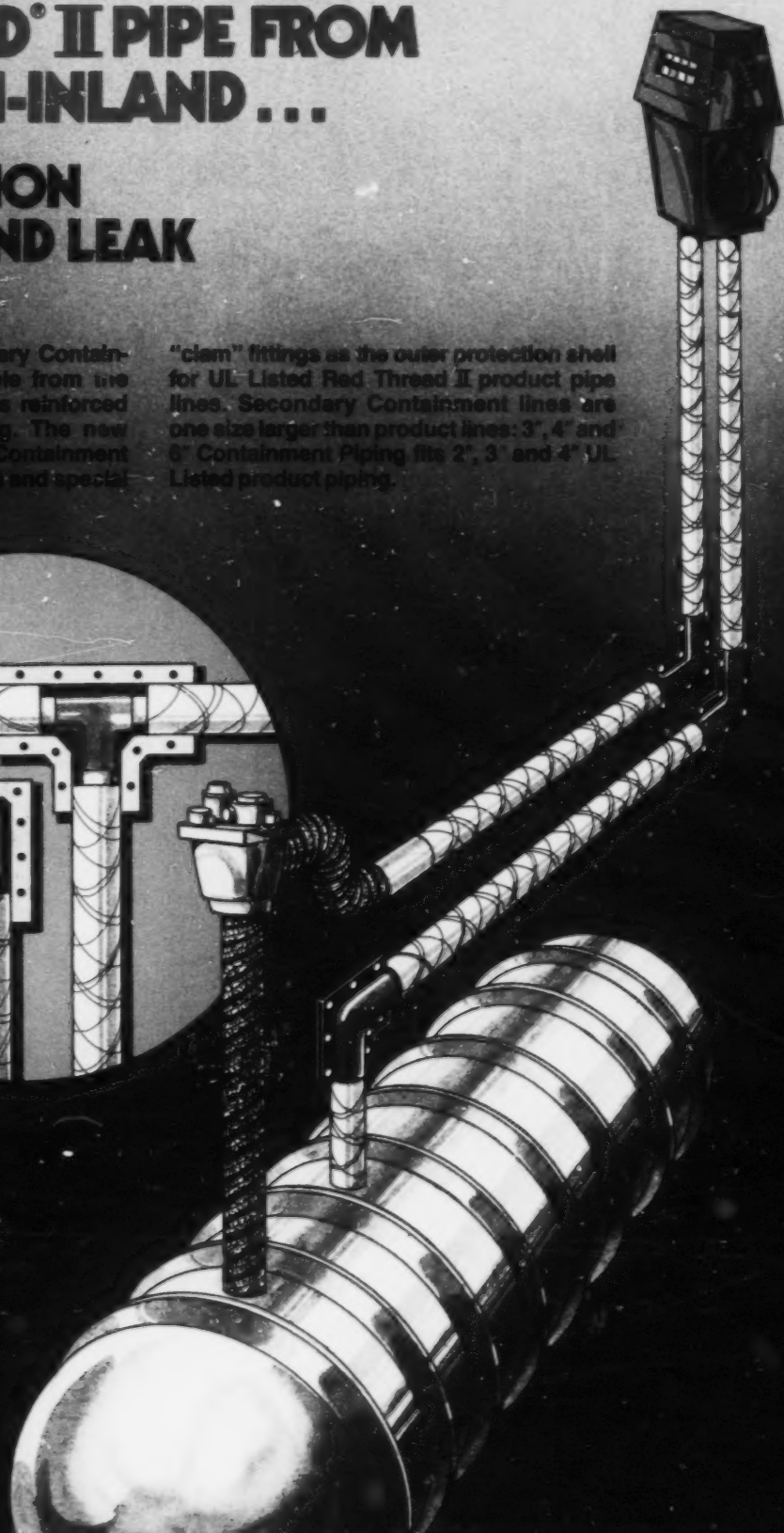
SERVICE STATION UNDERGROUND LEAK PROTECTION

The newest and best Secondary Containment system is now available from the primary supplier of fiber glass reinforced epoxy Service Station piping. The new A. O. Smith-Inland Secondary Containment system uses Red Thread II pipe and special

"clam" fittings as the outer protection shell for UL Listed Red Thread II product pipe lines. Secondary Containment lines are one size larger than product lines: 3", 4" and 6" Containment Piping fits 2", 3" and 4" UL Listed product piping.



We'd like to tell you more about it.
Please call or write:
A. O. Smith-Inland Inc.,
2700 W. 65th Street,
Little Rock, AR 72209
(501) 568-4010,
TWX 910-722-7377.



194 Marketing Management

1985 National Petroleum News Factbook Issue

NEW ORLEANS OIL CO.

P.O. Box 51817
Lafayette, LA 70505
(318) 234-2357
Key: T-M; G, D
Mary L. Pickrell, Chmn. & Pres.
Thomas L. Pickrell, VP, Sec./Treas.
Gen. Mgr.

■ OSGE OIL & TRANSPORT

P.O. Box 29
Cleveland, OK 74020
(918) 358-2541
Key: T-M; G, D, L
Carl S. Carnes, CEO
C. Dwein Carnes, Pres.
Jack B. Halsey, Exec. VP
E. R. Calison, Mktg. VP

■ PACER ON. COMPANY
P.O. Box 4409

Tulsa, OK 74159

Key: T, M; G. D. L.
Robert Parker, Pres.
Fred Wick, VP
Francine Parker, VP

■ PACIFIC NORTHERN O
1100 Olive Way, Suite
Seattle, WA 98101
(206) 382-8777

1100 Olive Way, Suite 1000
Seattle, WA 98101

Key: M; G, Fax, Dir
R. B. Merrill, CEO
D. J. Trapp, Exec. VP, Supply
S. H. Clark, Exec. VP, Opns.
F. D. Moore, VP, Mktg.
J. D. Lennon, VP, Supply

■ PARKER OIL CO. INC.

J. D. Lennon, VP, Supply

■ **PARKER OIL CO. INC.**
P.O. Box 120
South Hill, VA 22870
(804) 447-3145
Key: M: G, F, D, L
Sub: First Energy Corp.
Lewis W. Parker Jr., Pres. & CEO
Charles F. Parker, Exec. VP
Lifton D. Allen, VP
Wm. B. Jacobs Jr., Sec.
Wm. Hudson, Retail Sale

Sub: First Energy Corp.

Lewis W. Parker Jr., Pres. & CEO
Charles F. Parker, Exec. VP
Lifton D. Allen, VP
Wm. B. Jacobs Jr., Sec.
Wm. Hudson, Retail Sls.
M. G. Daniel Sr., Whlsl. Sls.
Lynn Roberts, Adv. & Whlsl. Sls.

INC.
195 Memorial Avenue

■ **PEAVEY OIL CO.**
P.O. Box 787
McMinnville, OR 97128
(503) 472-6138
Key: T, M; G, F, D, LPG, L
Pat Phillips, Pres.
Elaine Turpeinen, VP
Richard Young, Opns. Mgr.

Tower 14 Suite 1160

21700 Northwestern Hwy.
Southfield, MI 48075
(313) 559-1000
Key: M; G, F
Marvin Fleischman, Pres.
Steve Robinson, Sec.
Jeffrey Fleischman, Mktg. Sls.

Peerless Petroleum Co.

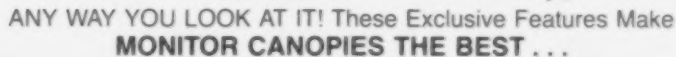
Galleria Tower-815E

5065 Westheimer
Houston, TX 77056
(713) 871-0111

■ PENNSYLVANIA PETROLEUM

PRODUCTS CO.
 Export & Storage Co.

Front & Shunk Sis.
Philadelphia, PA 19148
(215) 467-2600
Key: O-Lubricant Compounder/Blender
Packager; LW
Herbert L. Steinberg, Pres. & CEO
Marc H. Steinberg, Exec. VP
Norman Schwartzman, Gen. Sis. Mgr.
B. Perry, Export Mgr.



- 1 Computer Designed and Perfectly balanced—WE PLAN!
2 No Claims for Damaged Parts—WE DELIVER!
3 No Unloading of Factory Truck—WE UNLOAD!
4 No Holes to Drill—No Field Assembly by you—WE ERECT!
5 100% Galvanized Steel Roofing and Frames—AVAILABLE!
6 Computerized Shipping list eliminates field shortages
7 Monitor has the best designed Canopy in the U.S.A.



"The Canopy People"

P.O. BOX 1315 SHERMAN, TEXAS 75090 PHONE (214) 893-6336

MONITOR, INC. — Attn: Dept. FB85

P.O. Box 1315
Sherman, Texas 75090

Please send more information on ☐ Monitor Canopies ☐ Buildings
☐ Send Information ☐ Have your representative call on us

Name _____ Company _____

Address _____ Phone _____

City _____ State _____ Zip _____

KEY

I	.....	Integrated
T	.....	Transporter
R-M	.....	Refiner-marketer
M	.....	Marketer
G	.....	Gasoline, wholesale/retail
F	.....	Fuel Oil, wholesale/retail
D	.....	Diesel, wholesale/retail
LPG	.....	Liquefied petroleum gas wholesale/retail
L	.....	Lubricants, wholesale/retail
w	.....	wholesale only
r	.....	retail only

PENNZOIL PRODUCTS COMPANY

Pennzoil Place
P.O. Box 2967
Houston, TX 77001
(713) 546-4000
Key: M. G. F. D. L.
T. W. Warren, Pres. & CEO

Pennzoil Co.
4104 Gateway Center
Pittsburgh, PA 15222
(412) 263-3670

Manufacturing Supply Div.
R. F. Rabie Jr., Exec. VP
W. M. Robb, Sr. VP, Manufacturing
Ops.
C. C. Cook, VP, Ref. Sls. (Atlas
Processing Co.)

Hydrocarbon Supply Div.
R. L. Hoffman, Sr. VP, Eco. & Png.

Industrial Specialties & Lubricants Div.
Penneco/Magie
106 South Main St.
P.O. Box 671
Butler, PA 16001
P. V. Croft, Sr. VP

Automotive Products Division
F. A. Turner, Exec. VP

Motor Oil Division
Pennzoil Place
P.O. Box 2967
Houston, TX 77001
R. A. Valentine, Sr. VP
R. A. Fetherston, VP, Eastern Region
A. W. Evans, VP, Central Region
E. M. Johnson, VP, Pacific Region
W. E. Weicher, VP, Sls. Devel.

Operations & Industrial Lubricants
J. C. Grisson, VP
J. R. Corby, Dir., Pkg. Opts.
D. M. Johnson, Dir., Prod. Engr.
J. M. Martin, Dir., Lube Supply & Distrib.

Retail & Specialties
410 Four Gateway Center
Pittsburgh, PA 15222
D. H. Benckart, Sr. VP
E. C. Sherry, Mgr., Ret. Mktg.
R. D'Onofrio, Mgr., Gumout Sls.
C. F. Magliaro, Wolf's Head Sls.

PESTER CORPORATION

303 Keo Way
P.O. Box 10006
Des Moines, IA 50306
(515) 282-5000
Key: T-R-M; G. F. D. L. PPG, Lr
Subs: Pester Marketing Co.
Pester Refining Co.
Petroleum Special Inc. of Iowa
Jack Pester, CEO
Charles Worman, Pres.
Philip Walsh, Exec. VP, Finance
Robert Schmadelke, VP, Mktg., Northern
Div.
Jack Scourlock, VP, Mktg., Southern Div.
John Lettich, VP, Admin.
John Fletcher, Exec. VP, Gen. Counsel

PETRO-CANADA PRODUCTS INC.

1 Place Ville Marie
Montreal, Quebec H3B 4A9
(514) 879-7200
Key: I; G. F. D. L. PPG, L.
W. A. West, Pres.
R. J. Mayo, Sr. VP, Coord. & Devel.
J. Pantelidis, VP, Mktg., Coord. & Devel.
P. Dupuis, Sr. VP, Eastern Reg.
D. G. Mackenzie, Sr. VP, Central Reg.
W. R. Teras, VP, Western Reg.
R. C. Legge, Dir., Human Resources

PETROLEUM HEAT & POWER

Devenport ST
Stamford, CT 06904
(203) 323-2121
Key: M; G. F. D. Lr
Malvin P. Sevin, Chmn. Brd.
Irak P. Sevin, Pres.
Justin McCarthy, Sr. VP
Joseph P. Cavanaugh, VP, Controller

PETROLEUM MARKETERS, INC.

1803 Santa Rosa Rd.
P.O. Box K-44
Richmond, VA 23388
(804) 288-4127
Key: M; G. F. D. L.
Subs: Whiting Oil Co. Inc.
Stop In Food Stores Inc.
P.M. Terminals Inc.
P.M. Transport, Inc.
Lynchburg Oil Co. Division
Fuel Oils Division
R. G. Roop, Chmn. & CEO
L. D. Hestley, Pres.
Billie F. Crowder, Sr. VP
David Walsh, VP, Whist. Mktg.
Terry M. Phelps, VP, Roanoke Div. Pres.
Whiting Oil & Stop In Food
Scott Blankenship, VP
William M. Jackson, Credit Mgr.
Ronald R. Hare, Gen. Mgr., Stop In Food
Stores
John W. Smith, VP, Richmond-
Lynchburg Div.

PETROLEUM PRODUCTS CORP.

900 Eisenhower Blvd.
P.O. Box 262
Harrisburg, PA 17115
(717) 539-0466
Key: M; G. F. D. L.
Sub: Harrisburg Div. Geo Harney, Terr.
Mgr.

John A. Arnold, Chmn. & CEO
Paul E. Ermlich, Pres. & COO
Donald P. Cook, VP, Whist.
Edward Krause, Mgr., Lube Oil Sls.
Tom M. Carper, Credit Mgr.
Anthony F. Minito, Opts. Mgr.

PETROLEUM SALES & SERVICE

350 Ohio Street
Buffalo, NY 14204
(716) 856-9675
Key: M; G. D.
Subs: Buffalo Sylvette Corp.
Sher-Two, Inc.
Service Station Rental
S. Stepien, Pres.
Abraham Stepien, Exec. VP
Joel M. Stepien, VP, Mktg.
Richard Thompson, Treas.
Charles Hoff, Controller

PETTYWAY OIL CO.

3324 Alton Park Blvd.
Chattanooga, TN 37409
(615) 288-4161
Key: I; M; G. F. D. L.
William D. Pettyway Jr., Pres. & CEO
Vanessa E. Trimble, VP, Admin.
Vivian Lane, Treas.
James C. White, Mgr., Retail Sls.
James C. White Jr., Mgr., Supply &
Distrib.
Henry T. Apple, Mgr., Farm Sls.
Thomas F. Hixson, Mgr., Transport Sls.
Jesse P. James, Mgr., Maint. Div.

PHILLIPS FUEL OIL

432 S. River St.
Hackensack, NJ 07602
(201) 343-6806
Key: T; Gr

James W. Phillips, Chmn.
John S. Hendricks, Pres.
C. Willard Phillips, Exec. VP
Martin A. Becker, VP, Sr. Advisor
Louis Prida, Sls. Mgr.
Carl F. Kopmann, Controller

PHILLIPS PETROLEUM CO.

Bartlesville, OK 74004
(918) 661-5500
Key: I; G. F. D. L. PPG, L.
Sub: Aero Oil Co.
C. J. Siles, CEO
Glenn A. Cox, Pres.
C. L. Bowerman, VP, Mktg.
W. E. Anderson, Mgr., Retail Mktg.
A. R. Maloway, Mgr., Mktg. Sls. & Svcs.
P. R. Cleak, Gen. Sls. Mgr.
D. A. Johnson, Gen. Sls. Mgr.
J. E. Lewis, Gen. Sls. Mgr.
R. A. Kurland, Mgr., Spec. Prod. Sls.
W. R. Pahmeier, Mgr., Planning &
Budgeting
H. D. Schimpf, Mgr., Whist. & Supply
D. J. Pasetk, Mgr., Adv. & Merchandising
W. P. Buhlinger, Mgr., Lubricants
J. L. Hammond, Mgr., Aviation
J. M. Prentice, Mgr., TBA

Denver Area

8055 E. Tufts Avenue Parkway
Denver, CO 80237
(303) 860-4978
R. H. Bock, Area Retail Mgr.

Tulsa Area

Burning Tree Executive Park, Bldg. 3
8128 E. 63rd St., Suite B
Tulsa, OK 74133
(918) 254-0666
G. S. Page, Area Retail Mgr.

St. Louis Area

P.O. Box 1066
Lakeview Office Center, Suite 306
14500 S. Outer Forty Rd.
Chesterfield, MO 63017
(314) 434-6645
R. A. Harding, Area Retail Mgr.

Dallas Area

2929 N. Central Parkway
Richardson, TX 75080
(214) 690-3872
D. E. Lawler, Area Retail Mgr.

Chicago District

989 Plaza Drive, Suite 215
Schaumburg, IL 60195
(312) 843-0886
J. F. LaRue, Dist. Mgr.

Des Moines District

Regency West
1501 50th Street, Suite 280
West Des Moines, IA 50385
(515) 223-6786
J. K. Rhoades, Dist. Mgr.

Kansas City District

Financial Plaza Bldg. E
6800 College Blvd., Suite 130
Overland Park, KS 66211
(913) 345-8800
J. L. Keller, Dist. Mgr.

Minneapolis District

Northwestern Financial Center
7900 Xerxes Avenue, S-Suite 538
Minneapolis, MN 55431
(612) 835-6888
Y. A. Wenzel, Dist. Mgr.

Omaha District

Commercial Federal Tower Office
2120 S. 72nd St., Suite 475
Omaha, NE 68124
(402) 382-2157
J. G. Wright, Dist. Mgr.

Shreveport District

3341 Younes Drive, Suite 113
Shreveport, LA 71105
(504) 889-3158
B. A. Liens, Dist. Mgr.

St. Louis District

P.O. Box 1066
Lakeview Office Center, Suite 306
14500 S. Outer Forty Rd.
Chesterfield, MO 63017
(314) 434-6645
R. W. Friedewald, Dist. Mgr.

Amarillo District

3605 Olsen Blvd., Suite 262
Amarillo, TX 79109
(806) 355-8851
L. E. Rapier, Dist. Mgr.

Dallas District

2929 N. Central Expressway
Richardson, TX 75080
(214) 690-3886
W. W. Thomson, Dist. Mgr.

Denver District

8655 E. Tufts Avenue Parkway
Denver, CO 80237
(303) 860-3079
R. B. Houston, Dist. Mgr.

Houston District

6330 W. Loop South, Suite 701
Bellaire, TX 77401
Box 1967, Houston, TX 77061
(713) 969-3663
R. F. Lewis, Dist. Mgr.

Salt Lake City District

P.O. Box 72450
655 E. 4500 South
Salt Lake City, UT 84197
(801) 263-6299
C. L. Harner, Dist. Mgr.

Tulsa District

Burning Tree Executive Park, Bldg. 3
8128 E. 63rd Street, Suite B
Tulsa, OK 74133
(918) 252-0664
M. N. Harris, Dist. Mgr.

Atlanta District

Box 4633
2965 Flowers Rd. South, Suite 120
Atlanta, GA 30302
(404) 451-1332
W. L. Kearns, Dist. Mgr.

Birmingham District

31 Inverness Center, Suite 345
Birmingham, AL 35243
(205) 967-6296
D. E. Butler, Dist. Mgr.

Cleaverwater District

51 Main Avenue, Suite 383
Cleaverwater, FL 33575
(813) 443-8888
L. A. Jensen, Dist. Mgr.

Columbus District

500 W. Wilson Bridge Rd., Suite 290
Columbus, OH 43066
(614) 436-2646
W. N. Tolbert, Dist. Mgr.

Louisville District

10101 Linn Station Rd., Suite 730
Louisville, KY 40223
(502) 436-8650
M. L. Jernigan, Dist. Mgr.

Raleigh District

Box 95174
Texas Instruments Bldg.
2809 Highlands Blvd., Suite 103
Raleigh, NC 27625
(919) 876-5824
J. R. Downing, Dist. Mgr.

PHASA MOTOR FUELS INC.

P.O. Box 484
Alton, IL 62902
(815) 254-7341
Key: T; M; G. F. D. L.
Robert W. Schimpf, Pres. & CEO
Donald F. Schimpf, Exec. VP
S. Wiley Davis, VP, Mktg. & Gen. Sls. &
Adv. Mgr.

J. W. PIERSON CO.

89 Dodd St.
East Orange, NJ 07019
(201) 673-5000
Key: M; Ft. Dr.
J. W. Pierson, Pres.
Suzanne Davis, VP, Sec.
Jesse Davis, Dist. Sls. Mgr.

PILOT OIL CORP.

P.O. Box 10146
Knoxville, TN 37919-0146
(615) 588-7487
Key: M; G. F. D. L.
James A. Haslam II, Pres.
James A. Haslam III, VP
William E. Haslam, VP
Rex E. Fox, Treas.
Ronald A. Motley, Mktg. Mgr.

PIONEER OIL CO. INC.

P.O. Box 16935
Philadelphia, PA 19153
(215) 727-2180
Key: O-Lubricant manuf.; L.
Samuel S. Simon, Pres.
Morton Segal, VP
Henry Osborn III, Treas.
John Cunningham, Mktg. VP

PLACID REFINING CO.

3800 Thanksgiving Tower
Dallas, TX 75201
(214) 741-3081
Key: R; M; G. F. D. L.
Sub: of Placid Oil Co.
C. D. Brown, Pres.
Walter V. Fraiser, VP
P. G. Clarke, VP
B. J. Johnson, VP, Land
Feather Wilson, VP, Geol. & Phys.

Port Allen Refinery

P.O. Box 350-B
Port Allen, LA 70767
(504) 387-0278
C. B. Keys, Plant Mgr.

P.O. Box 88421

Baton Rouge, LA 70806
(504) 927-5934

P.O. Box 1146

Tallulah, LA 71282
(318) 574-1298
Ron Hancock, Whist. Sls. Rep.

PORT OIL

1796 Meeting St., P.O. Box 31819
Charleston, SC 29417
(803) 723-3496
Key: T; M; G. F. D. L.
Larry W. Cochran, Pres. & CEO
R. E. Harris, VP, Mktg.
Jesse O. Brown, Reg. Mgr.
Florence A. Morton, Personnel
John G. Meoyants, Sls. Mgr. Lubr.

POWER TEST CORP.
175 Sunnyside Blvd.
Plainville, NY 11803
(616) 578-6662
Key: T. M. G. F. D. L.
Subs: Power Test Pst. Dist.
Power Test of N.J.
P.T. Petro Corp.
Laemell's Petroleum
Staten Island Gasoline Corp.
Clay Oil Terminals, Inc.
Donna Oil Corp.
Gasway, Inc.
Lee Lisbowitz, Pres.
Milton Sollenowitz, Exec. VP
Herbert Wechsler, VP. Sls. Mktg.
Geo. DeForest, VP. Real Estate

PRIDE OF TEXAS DIST. CO.
P.O. Box 1206, 1905 W. Pioneer
Parkway
Arlington, TX 76010
(817) 381-2575
Key: M. G. F. D. L.
Homer L. McGinnis, Pres.

PRIDE OIL CO., INC.
P.O. Box 2344
Columbus, MS 39204-2344
(601) 328-7787
Key: T. M. G. F. D.
Eddie B. Byars Jr., Pres.
Ralph W. Byars, VP
Elizabeth E. Byars, Corp. Sec.

PRIDE OIL CO., INC.
5414 Clinton Hwy, P.O. Box 12028
Knoxville, TN 37912
(615) 987-4662
Key: M. G. F. L.
Subs: Keno Oil Co., Inc.
Magnolia Package Store
Andrew J. Gettelinger, Pres.
Hugh T. Stooksbury, Controller
Paul Lawson, Gen. Sls. Mgr.

PRIVATE BRAND SERVICES, INC.
1610 S. Mitchell Street
Cassiac, MI 48801
(816) 775-1326
Key: M. G. F. D.
Joseph W. Davis, Pres.
Larry J. Davy, VP
Irene T. Davy, Sec. & Treas.
Lynda Herdegen, Asst. Sec. & Treas.

PUBLIC OIL CO., INC.
2643 Paces Ferry Rd., Suite 160
Atlanta, GA 30339
(404) 436-4335
Key: M. G. F. D. L.
Subs: Dalton Oil Co., Inc.
Scottland Oil Co., Inc.
Hay Oil Co., Inc.
Dillon Service Co., Inc.
Public Distributing Co., Inc.
Tire Distributors, Inc.
Lionel B. Wilde, Pres. & CEO
John A. Keller, VP. Finance
Donald A. Langston, VP. Mktg.
Thomas F. Giles, VP. Sls.

Sales Offices:

Charlotte
P.O. Box 36188
25 Fortly Road
Charlotte, NC 28217
(803) 766-0234
(803) 766-0234
James "Bubba" Plumptre, Mgr.

Charlotte
220 Pennsylvania Ave.
Charlotte, NC 28214
(704) 383-1364
Joe Parker, Mgr.

Dalton
130 Cedar Ridge Road
Dalton, GA 30720
(404) 278-0288
Gordon Lawless, Mgr.

Dillon
301 East Main Street
Dillon, SC 29536
(803) 774-8531
Larry Turner, Mgr.

Gainesville
P.O. Box 2437
874 Athens Street Southeast
Gainesville, GA 30603
(404) 532-7031
Don Smallwood, Mgr.

Greenville
P.O. Box 5473, Station B
Renaissance Court
Greenville, SC 29606
(803) 232-5367
Ed Cox, Mgr.

Hickory
P.O. Box 3115
Hildebrand Exit I-40
Hickory, NC 28601
(704) 322-1040
P. C. Ray, Mgr.

Knoxville
5404 Middlebrook Pike
Knoxville, TN 37919
(615) 584-1533
Eddie Phipps, Mgr.

Laurel Hill
P.O. Box 337
Morgan Street
Laurel Hill, NC 28351
Gary Davis, Mgr.

Nashville
P.O. Box 245
Pegram, TN 37143
(615) 763-2869
Elaine Dickson, Mgr.

W. H. PUGH OIL CO.
200 Dodge St.
Racine, WI 53402
(414) 632-4491
Key: M. G. F. D. L.
W. H. Pugh Sr., Pres. & CEO
W. H. Pugh Jr., VP
Sigurd Hegland, Sec.

PURITY OIL CO.
11306 E. 22nd
Tulsa, OK 74129
(918) 438-1970
Key: M. G. D.
Subs: Fastop Stores of Oklahoma, Inc.
Fastop Stores of Arkansas, Inc.
Kenby Oil Company
Robert D. Phillips Jr., Pres. & CEO
Steven D. Cox, VP

PYRAMID OIL CO.
140 County Rd.
Tenafly, NJ 07670
(201) 568-9630
Key: M. G. F. D.
Victor Cinu, Pres.
Glenn Zomack, VP
Charles Waldron, Sls. Mgr.

QUAKER STATE OIL REFINING
P.O. Box 989
Oil City, PA 16301
(814) 676-7676
Key: I. Gw. Dw. Fw. Lw.
Subs: Corn Brothers, Inc.
Quaker State, Inc.
Textstar Automotive Group, Inc.
Truck-Lite Co., Inc.
The Valley Camp Coal Co.
Q. E. Woods, Bd. Chmn. & CEO
R. A. Markle, Pres.
W. Paul Hodges, Exec. VP
W. B. Cook, Exec. VP
J. D. Barry III, Exec. VP
S. A. Julian, Mgr., Nat'l Accts.
A. J. Fischer, Mgr., Fleet Commercial & Sls. Dept.
D. L. Fisher, Mgr., Auto. Consumer Prod. Dept.
C. J. Shelkey, Mgr., Coatings Dept.
W. E. Kingsley, Mgr., Supply & Distrib.
C. L. Wilbert, Mgr., Export Sls.
R. J. Rossib, Accts. Mgr.
P. F. Petraglia, Adv. Mgr.
T. C. Maxwell, Mgr., Customer Svcs. Dept.
J. P. Pearson, Gen. Mgr., Sterling Oil Div.
T. R. Moore, VP Mktg., Sterling Oil Div.
G. W. Freeman, Opns. Mgr., Sterling Oil Div.
J. N. Campbell, Acct. Mgr., Sterling Oil Div.

Corn Brothers, Inc.
P.O. Box 2397
Smyrna, GA 30081
(404) 799-7212

Textstar Automotive Group, Inc.
9060 Latty Ave.
St. Louis, MO 63134
(314) 521-3900

Quaker State, Inc.
P.O. Box 549
Burlington, Ont., Canada L7M 1T3
(416) 335-5577

QUALITY OIL CO.
Box 2736
Winston-Salem, NC 27102
(919) 722-3441
Key: T. M. G. F. D. L.
J. K. Glenn, Gen. Partner
B. L. Bennett Jr., Gen. Partner
J. K. Glenn Jr., Gen. Partner
Graham Bennett, Gen. Partner
B. R. Beck, Sls. Mgr.
J. S. Blackwelder, Credit Mgr.
P. L. Burton, Opns. Mgr.
J. B. Slate, Real Estate & Branch Supvr.
Rocky Nolen, Dir. of Finance
Harry Alexander, Quality Marts
Ernie Rhymer, Purchasing & Real Estate

QUARLES PETROLEUM
P.O. Box 5249
Fredericksburg, Virginia 22403
(703) 371-2400
Key: M. G. D. Fw
D. E. Quarles Sr., Pres.
D. E. Quarles Jr., CEO
Ben Walle, Treas.
John McIntyre, Opns. Mgr.
Gary McEntee, Controller
Stuart Fears, Gen. Mgr., Quarles Petroleum, Fredericksburg
Tom Gillespie, VP. Gen. Mgr., Quarles Oil of Warrenton
Thad Green, Gen. Mgr., Quarles Petroleum, Harrisonburg
Wayne Rountree, VP. Mgr., Quarles-Robertson Oil, Fairfax
D. E. Quarles III, Gen. Mgr., Quarles Petroleum, Front Royal
Mike Cason, Gen. Mgr., Quarles Oil of Culpeper

QUIKTRIP CORPORATION
P.O. Box 3475
Tulsa, OK 74101
(918) 636-9551
Key: M. G. D.
Chester Cadieux, CEO & Pres.
Alvin Howerton, Exec. VP. Opns.
Lloyd Poston, VP. Petro. Opns.
Wyatt Phillips, VP. Mktg.
John Howerton, VP. Store Dvlpmt.
Terry Carter, VP. Finance
Ron Males, VP. Div. Mgr., Oklahoma
Mike Stanford, VP. Div. Mgr., Kansas City
John Scott, VP. Div. Mgr., Kansas
Mike Meroney, VP. Div. Mgr., Iowa

QUINCY OIL
70 Quincy Ave.
Quincy, MA 02169
(617) 773-2500
Key: M. G. D. F.
Subs: Quinoid Industries, Inc.
Subs: Deepwater Oil Terminals, Inc.
Consolidated, Inc.
Oil City Service Stations
W. R. Prang, Pres. & CEO
William G. Kiniry, VP. Gen. Mgr.
Robert P. Melchin, VP. Chief Fin. Off.
Louis J. Bagley, Credit Mgr.

QUORTRUP PETROLEUM CO.
P.O. Box 672
Carrollton, TX 75006
(214) 243-4854
Key: M. G. D. L.
W. H. Quortrup, Pres. & CEO

RACETRAC PETROLEUM, INC.
2825 Cumberland Parkway, N.W.
Suite 100
Atlanta, GA 30339
(404) 434-0400
Key: M. G. D.
Carl Bolch Jr., CEO & Pres.
Max Lenker, VP. Purchasing
Robert Stier, VP. Sls. Mgr.
Jeff Bachman, VP. Constr.
Richard Peoples, VP. Eng.
Bob Dumbacher, VP. Fin.

RALLY OIL CO., INC.
P.O. Box 1017
Melville, NY 11747
(516) 423-3030
Key: M. G. D.
Subs: Tartan Oil Corp.
Barry Tallering, Pres. & CEO

RED HEAD OIL
Irvine Rd.
P.O. Box 787
Richmond, KY 40475
(606) 623-6705
Key: M. G. F. L. D.
Alex Fassas, Pres. & CEO
Phil Montgomery, Mktg. Mgr.
Tom Fassas, Dir. Purchasing

REDWING CARRIERS, INC.
P. O. Box 30063
Tampa, FL 33630
(813) 621-2046
Key: T.
K. Charles Elliott, Pres.
David Fulkerson, VP. Admin.
Bill Wimbles, Exec. VP

REINAUER PETROLEUM CO.
101 E. Broadway, Box 66
Hackensack, NJ 07601
(201) 489-9700
Key: M. G. D.
B. Franklin Reinauer II, Chmn. & CEO
B. Franklin Reinauer III, Pres.
Robert J. Dydo, VP
Anthony Schiavino, Gasoline Sls. Mgr.

REINHARDT OIL CORP.
P.O. Box A
West Oneonta, NY 13861
(607) 432-6633
Key: M. G. F. D. LPG. L.
Subs: Reinhardt-Andrus Co.
B Z Bee Foods
Robert E. Seng, Pres. & CEO
Rudy Ballard, Exec. VP
Dave Harder, Gen. Mgr., Fuel Oil Sls.

RELIANCE UTILITIES
477 West John St.
Hicksville, L.I., NY 11802
(516) 931-6800
Key: M. F.
Malvin Sevin, CEO
Erik Sevin, Pres.
Larry Caputo, Gen. Mgr.

REMOTE SERVICES, INC.
P.O. Box 35580
Louisville, KY 40232
(502) 584-1281
Key: M. Gr.
Subs: CONNA Corporation
Subs: Convenient Gasoline Inc. (NY)
G. E. Wagner, Pres.
C. A. Reinhardt, No. Reg. Sls. Mgr.
William L. Jessie, So. Reg. Sls. Mgr.
M. S. Winner, Opns. Mgr.
Sally R. Brady, Mgr., Supply & Distrib.

REPUBLIC OIL CORP.
22514 Ventura Blvd.
Woodland Hills, CA 91364-1464
(818) 888-7532
Key: M. G. D.
Subs: Dixie Diesel Truck Stops
Richard A. Baldinger, Pres. & CEO
J. T. Helsen, Exec. VP & Sec.

REX OIL CO. OF FLORIDA
12314 Plantation Lane
North Palm Beach, FL 33408
(305) 694-0359
Key: M. G.
Jerry M. Porter, Pres.
Jerry M. Porter Jr., VP

REYNOLDS INDUSTRIES, INC.
33 Mt. Auburn St.
Watertown, MA 02172
(617) 924-4650
Key: M. G. D. Fr. LPG.
Subs: Port Oil Corp.
Port Oil Corp. Northeast
Philip L. Reynolds, Pres.
David G. Reynolds, VP

R.I. MARKETING, INC.
8500 Georgetown Rd.
Indianapolis, IN 46268
(317) 675-8500
Key: M. G. Fr. Dr. Lr.
Michael Deilen, Pres.
W. B. Conner, Exec. VP
Richard Jones, VP
Dallas Simon, VP

RIVER OIL CO.
1550 Channel Ave.
Memphis, TN 38113
(901) 948-8538
Key: M. Dw. Gw.
Subs: River Oil Company of Jackson (TN)
James L. Fri Jr., Pres.
Richard L. Jacobs, Pres., River Oil Co. of Jackson

F. L. ROBERTS & CO., INC.
P.O. Box 1964
Springfield, MA 01020
(413) 781-7444
Key: M. G. Fw. D. L.
Abbott S. Roberts, Chmn.
Steven M. Roberts, Pres.
John J. McGirr, Sr. VP
A. Seth Roberts, VP
Joseph F. Maggi, VP



Phillip Palma, Phil's Texaco, Canoga Park, California

"\$44,500 in extra income. My U-Haul dealership just keeps getting better."

"Last year was my best year ever as a U-Haul dealer. My rentals brought me \$44,500, and that's extra money coming in every month.

"And now U-Haul has raised the commission. So I can do even better.

"It's a terrific set-up. You just rent out the equipment. There's no fee, nothing to pay. U-Haul is good equipment, good management. And they take care of the

advertising. That brings in customers. Be good to them and they keep coming in.

"Plus people know U-Haul, they trust the company. And that makes a big difference. They come to you first. Work with a well-known, dependable company, and you can't go wrong.

"Especially now with the new commission. Higher than ever.

"Would I recommend it? Absolutely!"

U-HAUL®

To find out how you can become a U-Haul dealer, mail this coupon now. Or call John Huemmerich of U-Haul International at this toll-free number: 1-800-528-0361.

Yes, tell me how I can raise my profits by becoming a U-Haul dealer.

Name _____

Service Station Name _____

Address _____

City/State/Zip _____

Telephone _____

**Mail to U-Haul International
P.O. Box 21503
Department NPN685
Phoenix, Arizona 85036**

ROBINSON OIL CO., INC.

4250 Williams Rd.
San Jose, CA 95129
(408) 255-9531
Key: M; G, D
Subs: Mission Trail Oil Co.
M T Transportation, Inc.
Donald L. Robinson, Pres.
Thomas L. Robinson, VP
Gerald C. Cummings, Retail Mgr.
John E. Kloster, Controller

ROCK ISLAND REFINING CORP.

P.O. Box 58007
Indianapolis, IN 46258
(317) 872-3200
Key: R; M; G, D, Fw, LPGW
Subs: Rock Island Resource Co., Inc.
R. I. Marketing, Inc.
W. E. Huff, Pres.
F. W. Grube, Exec. VP
J. P. Hofer, VP Fin.
J. E. D. Boudier, Mgr. Whist. Sls.
D. L. Musolino, Mgr. Nat'l Accts.
J. O. Davis, Public Rel. Mgr.

ROCKET OIL CO.

P.O. Box 9022
Canton, OH 44711
(216) 452-7945
Key: M; Gw
Donald C. Coen, VP

ROSS RESOURCES, INC.

310 West Central, Suite 121
Wichita, KS 67202
(316) 264-6113
Key: M; G, D, Lr
Ron R. Ross, Pres.
James T. Ross, VP

RYAN-DEWITT CORP.

4088 Pearl St. Rd., P.O. Box 191
Batavia, NY 14020
(716) 343-4444
Key: M; G, F, D, L
Subs: Albion Oil Co., Inc.
L. W. Stroup Corp.
Neil T. Burns, Pres.
Elsie F. Ryan, Sec.-Treas.
Richard Howard, VP Sls.
Lewis Grass, VP Opns.
J. A. Tresco, Comptroller

SAHARA OIL CO., INC.

P.O. Box 6574
Phoenix, AZ 85005
(602) 253-2159
Key: M; G, D
Robert L. Ragel, Pres.

SAN ANN SERVICE

P.O. Box 618
Boaz, AL 35957
(205) 593-5286
Key: M; D
John Britton, Mgr.

SANTA FUEL INC.

154 Admiral St.
Bridgeport, CT 06605
(203) 367-3661
Key: M; F
Subs: Buckley Energy Group Ltd.
Inland Fuel Terminals, Inc.
S. George Santa, Pres.
Donald F. Santa, Sec.
John S. Santa, Treas.
Norman K. Santa, VP
Robert Benn, Sls. Mgr.

SANTEE OIL CO., INC.

P.O. Box 567
Kingstree, SC 29556
(803) 354-6131
Key: M; G, F, D, L
W. H. Cox, Pres.
C. G. Bass, VP-Treas., Gen. Mgr.
Joan M. Cox, Sec.

SAVCO INC.

7813 Percival Rd.
P.O. Box 84
Columbia, SC 29206
(803) 787-8245/799-5472
Key: M; G, LPGW, Lr
L. L. McNair, Pres. & CEO
Charles E. McNair, Exec. Mktg. VP

SAVE-X, USA, INC.

130 Sycamore Ave.
Roanoke, VA 24012
(703) 342-7885
Key: M; Gr, Dr
Sub: Serv-n-Save, Inc.
Roy R. Pollard Jr., Pres. & CEO
W. Earle Spruill Jr., VP & Gen. Mgr.
Paul H. Powell, Dvlpmt. & Opns. Mgr.

SAVINGS OIL CO.

P.O. Box Drawer 1888
Tupelo, MS 38802-1888
(601) 842-7525

SCASCO

(The Standard Cycle & Auto Supply Co.)
22 Rowley St.
Winsted, CT 06098
(203) 379-3322
Key: M; G, F, D, Lw
Milton Dolinsky, Pres. & CEO
David Dolinsky, Exec. VP & Sec.
George Mesloh, Sls. Mgr.
Richard MacPherson, SVP
William Harding, Mgr., Fuel Oil Sls.
William Boucher, Mgr., Gasoline Sls.

SCHAEFFER OIL, INC.

Box 490
Winner, SD 57580
(605) 842-3509
Key: M; G, D, L
Dwight L. Schaeffer, Pres.
Brian K. Schaeffer, VP

SEABOARD INDUSTRIES, INC.

5810 New Peachtree Rd.
Doraville, GA 30340
(404) 451-6900
Key: O-Manufacturer; Lw
Subs: Seaboard Oil Industries of Florida, Inc.
Superior Products Company
Eastlake Oils, Inc.
Israel Katz, Pres. & CEO
Lee N. Katz, Exec. VP
Robert Ostendorf, Mktg. VP
Denise Goff, Gen. Sls. Mgr.
Conrad Felix, Mgr., Jacksonville
Steve Craig, Mgr., Greensboro
Jerry Ashteneau, Mgr., Lake Charles

SEARS OIL CO., INC.

1914 Black River Blvd.
Rome, NY 13440
(315) 337-1232
Key: M; G, F, D, Lr
Aff: Sears Petroleum & Transport Corp.
H. P. Sears Jr., Pres. & CEO
T. A. Sears, VP Sls. & Mktg. Opns.
James Plumb, Mgr., Retail Sls.
James Kittelman, Credit Mgr.
Geo. Brown, Off. Mgr.
David Miller, Acct.

SELF-SERVICE OIL CO.

53 Airport Drive, P.O. Box 6206
Rockford, IL 61125-1206
(815) 964-3920
Key: M; Gr, Dr
W. R. Williams, Pres. & CEO
W. R. Williams III, VP
Charles F. Bergquist, VP
Charles Mosebach, Supv. MO
Kellie VonDriska, Supv. IL-IA
Connie Flemming, Dist.

SEMINOLE ASPHALT REFINING

P.O. Box 128
St. Marks, FL 32355
(904) 224-1194
Key: R; F, D
H. Carl Vought, Pres.
B. M. Nichols, VP, Ref.

SHAHEEN NATURAL RESOURCES CO.

90 Park Ave.
New York, NY 10016
(212) 867-0250
Key: I, T, R, M; Gw, LPGW, L
Sub: of MacMillan Ring-Free Oil Co.
Jesse Taub, Pres.
Milton Hibdon, VP
Peter Caras, VP

SHAVER & MCCARTHY INC.

259 E. Lake St.
Wayzata, MN 55391
(612) 473-7391
Key: M; G, L
Baird Shaver, Pres. & CEO
Craig Shaver, Sec.

SHAY OIL CO., INC.

51 E. 10th St.
Yuma, AZ 85364
(602) 782-1828
Key: M; Gr, Dr
Sub: of Exxon
Daniel C. Shay, Pres.
Neal Schulmann, Gen. Sls. Mgr.
John Bonnet, VP, Mktg.

SHELL CANADA LTD.

P.O. Box 100
Calgary, Alberta T2P 2H5, Canada
(403) 232-3111
Key: I; G, D, F, LPG, L
Sub: of Royal Dutch/Shell Group
J. S. MacLeod, Pres. & CEO
D. J. Taylor, Exec. VP, Prod. Group
A. E. Seager, VP, Eastern Group
E. Wende, Mgr., Motors Strategy & Planning
R. D. Kowal, Mgr., Cons. Res.

SHELL OIL COMPANY

One Shell Plaza
P.O. Box 2463
Houston, TX 77001
(713) 241-6161
Key: I; G, D, Fw, LPGW, L
J. F. Bookout, Pres.
C. L. Blackburn, Exec. VP, E&P
J. H. DeNike, VP, Public Affairs
F. H. Richardson, Exec. VP, Prod.
D. B. Richardson, Pres., Shell Ref. & Mktg. Co.
J. R. Street, Pres., Shell Chemical Co.
J. W. Schutzenhofer, Gen. Mgr. Mktg.
Q. P. Graves, Gen. Mgr., Eastern Reg.
R. Lopez, Gen. Mgr., Western Reg.
R. J. Bertus, Gen. Mgr. Sup. & Trans.
L. L. Osborn, Mgr. Employee Relations
Support-Products
J. J. O'Connell, Mgr., Sls. & Bus. Svcs.
J. M. Morgan, Mgr., Lubricants Dept.
J. L. Golden, Mgr., Reg. Business Center—WOR
R. C. Harrell, Mgr., Reg. Business Center—EOR
S. C. Lancaster, Mgr., Prod. Distrib.
R. H. Gamett Jr., Mgr., Head Office Retail
J. F. Kelly, Venture Mgr.
W. L. Faulkenberry, Mgr., Retail Mktg. Western
J. S. Bird, Mgr., Retail Mktg. Eastern
M. E. Thorne, Mgr., Retail Mktg. Midcontinent
D. R. Haaly, Mktg. Mgr. Jobber Sls., Eastern
W. S. Little Jr., Mgr. Comm. Mktg.
J. A. Rexrode, Nat'l Sls. Mgr., Lubricants Dept.

LUBRICANTS DISTRICTS

Chicago District
1415 West 22nd St.
Oakbrook, IL 60521
(312) 887-5718
L. L. Burch, Mgr.

Cleveland District

7123 Pearl Road
Middleburg Heights, OH 44130
(216) 842-4000
E. V. D'Innocente, Mgr.

East Coast District

100 Executive Drive
West Orange, NJ 07052
(201) 325-5497
E. Dent Jr., Mgr.

Houston (TX 77046) District

Westway Tower
24 Greenway Plaza
Suite 711
(713) 439-1000
E. L. Schmitz, Mgr.

West Coast District

511 North Brookhurst
Anaheim, CA 92803
(714) 991-9200
J. M. Coghlan, Mgr.

RETAIL MARKETING DISTRICTS

Atlanta (GA 30339) District
320 Interstate North Parkway
(404) 955-4600
J. W. Ludwig, Mgr.

Boston/Providence District

400 Blue Hill Drive
Westwood, MA 02090
(617) 326-8210
F. F. Kidd III, Mgr.

Miami District

100 S. Pine Island Rd.
Suite 130
Plantation, FL 33324
(305) 944-3487
R. L. Cheatham, Mgr.

New Orleans (LA 70150) District

P.O. Box 50598
(504) 588-4911
T. V. Barrows, Mgr.

New York District

1 Jericho Plaza
Jericho, NY 11753
(516) 938-8686
B. P. Vander Mel, Mgr.

Newark District

100 Executive Drive
West Orange, NJ 07052
(201) 325-5300
R. F. Gardner, Mgr.

Tampa (FL 33622) District

P.O. Box 22086
(813) 877-5741
F. E. Weltz, Mgr.

Mid-Atlantic District
10400 Little Patuxent Parkway
Suite 440
Columbia, MD 21044
(301) 995-1200
W. D. Ramsey, Mgr.

Chicago District

1415 W. 22nd
Oakbrook, IL 60521
(312) 987-5500
W. F. Butzloff, Mgr. North
J. L. Shanks, Mgr. South

Cleveland District

7123 Pearl Road
Middleburg Heights, OH 44130
(216) 842-4000
D. P. Archambault, Mgr.

Dayton District

1729 Miamiburg
Centerville Road
Dayton, OH 45449
(513) 856-6201
R. E. Woodworth, Mgr.

Detroit District

31275 Northwestern Hwy.
Farmington Hills, MI 21044
(313) 885-9000
J. B. Uguccioni, Mgr.

Houston/Dallas District

P.O. Box 22073
2400 West Loop, Suite 114
Houston, TX 77027
(713) 621-0330
B. T. Baty, Mgr.

Indianapolis (IN 46268) District

8500 N. Michigan Road
(317) 291-7440
W. J. Boumer, Mgr.

St. Louis (MO 63074) District

500 Northwest Plaza
Suite 1000
St. Ann, MO 63074
(314) 291-5700
G. W. Hadley, Mgr.

East Bay District

3468 Mt. Diablo Boulevard, Suite 8103
Lafayette, CA 94549
(415) 283-4200
T. J. O'Brien, Mgr.

Hawaii District

1441 Kapiolani Boulevard, Suite 1001
Honolulu, HI 96805
(808) 946-0761
R. L. Wilson, Mgr.

Los Angeles District

511 Brookhurst Street
Anaheim, CA 92803
(714) 991-9200
R. S. Kovacovich, Mgr., Central
H. W. Jenkins, Mgr., East
S. J. Charley, Mgr., West

Sacramento (CA 95813) District

P.O. Box 13678
(916) 481-0400
G. O. Chadwick, Mgr.

San Francisco District

1150 Bayhill Drive, Suite 200
San Bruno, CA 94066
(415) 952-2250
V. K. Clifford, Mgr.

Northwest District

400-108th Avenue, N.E.
Bellevue, WA 98004
(206) 453-3000
J. M. Biladeau, Mgr.

Southern California District

511 North Brookhurst Street
Anaheim, CA 92803
(714) 991-9200
R. M. Sherwood, Mgr.

KEY

I Integrated
T Transporter
R-M Refiner-marketer
M Marketer
G Gasoline, wholesale/retail
F Fuel Oil, wholesale/retail
D Diesel, wholesale/retail
LPG Liquefied petroleum gas
..... wholesale/retail
L Lubricants, wholesale/retail
w wholesale only
f retail only

■ **SHEPHERD OIL**
P.O. Box 100
Morrilton, AZ 85342
(602) 975-1111
Key: O-Alcohol dist.
P. Wyman Shepherd, Pres. & CEO
Richard Dodd, Exec. VP

■ **SHIPLEY-HUMBLE, INC.**
550 East King Street
P.O. Box 946
York, PA 17405
(717) 848-4100
Key: T, M, G, F, D
W. S. Shipley II, Pres.
H. C. Zimmerman, Exec. VP
J. F. Freet Jr., VP-Finance,
Sec.-Treas.
G. I. Icos, Asst. Sec., Credit Mgr.
D. E. Wilson, Mgr., Supply & Distrib.
R. C. Borden Jr., Mgr., Motor Fuels
Sls.
W. S. Shipley III, Retail Fuel Oil Sls.
Mgr.
I. E. Baumgardner, Mgr., Svcs. Dept.

■ **SHORES OIL CO.**
19933 Nine Mile Rd.
St. Clair Shores, MI 48080
(313) 776-2670
Key: M; G, F, D, L
Edward D. Brown, Pres.
Robert A. Dryden, Exec. VP
Edw. Vollenweider, VP
Vincent Manzo, Controller

■ **SHOTMEYER BROS. PETROLEUM CORP.**
10 Wagaraw Rd.
Hawthorne, NJ 07507
(201) 427-1000
Key: M; G, F, D, L
Henry Shotmeyer Jr., CEO
Charles Shotmeyer, Pres.
Henry Shotmeyer, Treas.

■ **SHOTMEYER OIL CORP.**
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200
(305) 392-8100
Key: M; Gr, Dr
Sub. of Albert Shotmeyer, T/A ASCO
United States Oil Corp.
Gas Pumpers of America Corp.
Motorgas Oil & Ref. Corp.

United States Oil Corp.
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200
(305) 392-8100
Key: M; Gr, Dr
Elizabeth Jo Shotmeyer, CEO
William Wrocklage, Pres.
Kathleen Ippoliti, VP
Myron T. Holman, Sec.

Gas Pumpers of America Corp.
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200, 423-1000,
(305) 392-8100
Key: M-U Save; Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth Jo Shotmeyer, VP

Motorgas Oil & Ref. Corp.
1 Valley St.
Hawthorne, NJ 07506
(201) 427-8200, 423-1000
Key: M; Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth Jo Shotmeyer, VP

ASCO TERMINALS:
Syracuse, NY Terminal
(315) 471-1022
Joseph Costello, Mgr.

Newburgh, NY Terminal
(914) 561-6200
Robert Speirs, Mgr.

Wilmington, DE Terminal
(302) 652-1000

■ **SICO COMPANY**
15 Mount Joy Street
Mount Joy, PA 17552
(717) 852-1411
Key: M; G, F, D, L
Sub. of The SICO Foundation
Sub: Clarence Schook
Franklin R. Eichler, Pres. & Treas.
Michael T. Reese, VP Mktg.
Charles W. Riedorf, VP Opns.
Robert K. Shank, Sec.-Asst. Treas.
Edward F. Zercher, Asst. Sec.-Retail
Mktg. Mgr.
Eugene W. Crider, Whol. Mktg. Mgr.
Gary Maxwell, Cust. Svcs. Mgr.
Phillip A. Veith, Svc. Stat. Mktg. Mgr.
PA
Bernie Branderbit, Svc. Stat. Mktg. Mgr.
New Jersey

■ **SIMMONS OIL CORP.**
8655 Via de Ventura
Scottsdale, AZ 85261
(602) 948-7250
Key: T-R-M; Gw, Fw
Subs: Simmons Crude Oil Co.
Simmons Terminal Corp.
Montana Refining Co. (50%
ownership with Holly Corp.)
Jerry Simmons, Pres. & CEO
J. D. Wessling, CFO
Wendy McGee, Treas./Comptroller
Bob Roehl, VP, Crude Oil

■ **SIMON OIL COMPANY, INC.**
1316 Main Street
Niagara Falls, NY 14301
(716) 285-9641
Key: M; G
Theodore Dimet, Pres.
Eugene Dimet, VP
Ken Kimmins, Gen. Sls. Mgr.
Peter Barber, C-Stores Supvr.

■ **SINCLAIR MARKETING**
P.O. Box 31825
Salt Lake City, UT 84131
(801) 363-5100
Key: T, G, Fw, Dm, L
R. E. Holding, Pres.
R. G. Little, VP
Bob Beard, Mgr., Supply & Distrib.
M. L. Rensink, Mgr., Asphalt Sls.
Clint Techmeyer, Credit Mgr.

■ **SING OIL CO.**
P.O. Box 1538
Thomsonville, GA 31799
(912) 226-1211
Key: M; G, D
L. H. Singletary, Chmn. of Brd.
Richard Singletary, Pres.
T. E. Perry, Exec. VP
John L. Parker, VP Mktg.
W. D. Strickland, Retail Estate Mgr.

Protect Your Company With Trustworthy Quantity and Quality Control

SAYBOLT

"The Industry's Standard for Over 80 Years"

• INSPECTION
• LABORATORY
• CALIBRATION
and other
SERVICES
ESSENTIAL for
PETROLEUM
and BULK CARGO
MANAGEMENT



E. W. SAYBOLT & CO., INC.

GENERAL HEADQUARTERS: 400 SWENSON DRIVE, KENILWORTH, N.J. 07033
PHONE 201-245-3100 TELEX: 13-9317
TWX: 710-996-5973 84-4791

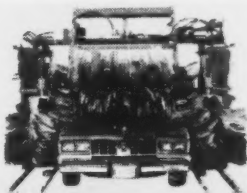
INLAND WATERWAY DIVISION:
2100 L&A ROAD
METAIRIE, LA 70181
PHONE: 504-833-1463
TWX: 810-951-6061

GULF COAST DIVISION:
1404 SO. HOUSTON-PASADENA RD.
PASADENA, TEXAS 77502
PHONE: 713-477-8171
TWX: 910-881-1751

WEST COAST DIVISION:
115 AVALON BLVD.
WILMINGTON, CA 90744
PHONE: 213-549-7990
TWX: 910-345-6391

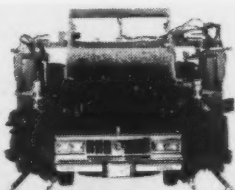
FREE LITERATURE NU+STAR

Family of Car
Washing Systems



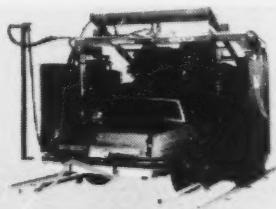
POLI-PAD

Polishes as it washes . . . incorporates the same cloth pads that are used on automatic buffing machines . . . the ultimate in quality car washing. Washes vehicles from sub-compact cars to commercial vans 84" in height. Solid State control panels.



Classic

Solid state printed circuit control panels. All plug-in timers and relays are eliminated. Most reliable performance . . . a rollover car washer with soft brushes . . . excellent cleaning ability in the most exacting jobs. Available in 84" and 92" clearances.



NU+HORIZON

New simplified all-hydraulic car wash. Requires only water and electrical connections. The least complicated automatic car wash system manufactured today. Available for soft brush or POLI-PAD cloth. Washes vehicles up to 88" in height.

Stay Ahead of the Competition
With NU+STAR Washing Systems!



**BOULAY
MARKETING
CORP.**

NATIONAL MARKETING FOR NU+STAR CAR WASH SYSTEMS
5553 XERXES AVE. SO. • MINNEAPOLIS, MN 55410
612/929-2639

■ **SINKLER INC.**
650 Knowles Ave.
Southampton, PA 18966
(215) 357-7100
Key: M; Gr, F, D
Albert W. Woosnam Jr., Pres.
Douglas E. Woosnam, VP
Richard E. Greim, Sec.
Gene Michelson, Fuel Oil Sys. Mgr.
Steve Yenchik, Equipment Sys. Mgr.

■ **SITE OIL CO.**
7755 Carondelet
St. Louis, MO 63105
(314) 725-4321
Key: M; Gr, Fr
Alvin Siteman, Pres.
Chris Kempf, VP, Mktg.

■ **SMITH-SHAFFER OIL CO.**
P.O. Box 580
Rockford, IL 61105
(815) 965-6767
Key: M; G, F, D, Lr
Ernst S. Shafer, Pres. & CEO
C. Gordon Smith, Sec.

■ **SMO, INC.**
P.O. Box E
LaPlata, MD 20646
(301) 934-8101
Key: M; G, F, D, LPG, L
Sub: Delmarva Oil, Inc.
J. Blacklock Wills, Pres.
Charles F. Buyers, Sr. VP
J. Blacklock Wills Jr., VP, Mktg.
J. R. Binette, Motor Fuels Div. Mgr.
J. A. Gateau, Heating Fuels Div. Mgr.

■ **SOMERSET REFINERY**
520 Monticello St.
Somerset, KY 42501
(606) 679-5301
Key: R, M; G, F, D, L
W. T. Walker, Pres.
T. S. Ballance, VP
Cy Waddle, VP
Merrell Henderson, VP, Sys. & Distrib.

■ **SOS OIL CORP.**
P.O. Box 833
Tuxedo, NY 10967
(914) 351-4709
Key: M; G, F, D, L
George Spiegel, Pres.
Richard Spiegel, Sec./Treas.
Linda Wilkinson, Office Mgr.
Albert Silberlicht, Gen. Mgr.

■ **J. R. SOUSA AND SONS**
29 Andover St.
Danvers, MA 01923
(617) 777-1500
TWX 710-347-0809
Key: M; G, F, D, L
Joseph J. Sousa, Pres.
Jerome R. Sousa Jr., Treas.
John Martino, Mgr., Sup. & Distrib.
Louis Arvenites, New Engl. Sys. Mgr.
James Whitaker, Albany Div. Mgr.
Gary Kuzcek, Poughkeepsie Div. Mgr.
Lawrence King, Comput.

■ **SOUTHERN COUNTIES OIL CO.**
1011 Laguna Road
Tustin, CA 92680
(714) 544-7140
Key: M; G, D, L
Frank H. Greinke, Pres. & CEO
Richard Becktel, Exec. VP, Whol.
Frank P. Greinke, Exec. VP, Retail
Robert Kennedy, Mktg. VP

■ **SOUTHERN OIL CO., INC.**
P.O. Box 1278
Suffolk, VA 23434
(804) 539-2374
Key: M; G, F, D, L
C. P. Holland Jr., Chmn.
David L. Holland, Pres.

■ **SOUTHERN STATES CO-OP**
P.O. Box 26234
Richmond, VA 23260
(804) 281-1000
Key: R-M; G, F, D, LPG, L
Gene A. James, Pres. & CEO
M. T. Ragdale, VP, Pet. & Supply Div.
Raymond Works, Mgr., Pet. Svcs.

■ **SPARTAN PETROLEUM CO., INC.**
P.O. Drawer 1170
Spartanburg, S.C. 29304
(803) 585-3416
Key: M; Gw, F, Dw, Lw
R. E. Mitchell, Pres. & CEO
G. E. Mitchell, Exec. VP
W. T. Hope, Sys. Mgr.
M. L. Laverette, Sec.
R. H. Mitchell, Sys. Coord.

■ **SPEEDWAY PETROLEUM CO.**
237 Lunenburg St.
Fitchburg, MA 01420
(617) 345-4688
Key: M; G, F
Donald R. Tucker, Pres. & CEO
Jeff Bridgeman, Mgr., Retail Sys.
June LeMieux, Credit Mgr.
Richard Grant, Opns. Mgr.

■ **SSG CORPORATION**
1207 Coulee Rd.
Hudson, WI 54015
(715) 386-8281
Key: M; Gr
Burt Nordstrand, Pres.
Gail Nordstrand Dahlstrom, VP
Larry Hopkins, Treas.
Jim Coen, Gen. Sys. Mgr.

■ **THE STANDARD OIL COMPANY (OHIO)**
Midland Building
Cleveland, OH 44115
(216) 575-4141
Key: I; G, F, D, LPGw, L
Affiliate of British Petroleum Limited
Subs: BP Oil Inc.
Boron Oil Company
Mountaineer Carbon Company
Truckstops of America
A. W. Whitehouse, Chmn. & CEO
J. R. Miller, Pres. & Chief Opn. Offic.
F. E. Mosier, Exec. VP, Downstream
Patro.
J. G. McDonald, Pres., Sohio Oil
R. M. Donaldson, VP, Govmt. and Public
Rel.

Retail Marketing
H. D. Hanna, Sr. VP
J. D. Campbell Jr., VP, Branded Mktg.
D. L. Gaetjens, Gen. Mgr., Comcl. Sys.
H. T. Bubbs, Gen. Mgr., Retail Sys.
J. R. T. Bassett, Gen. Mgr., Jobber Sys.
R. J. Pillari, Gen. Mgr., Truck Stops
D. P. Gleichauf, Mgr., TBA Sys.

Wholesale Marketing
D. A. Snively, VP
G. C. Greve, Mgr., Comcl. Whol. Sys.
D. B. Smith, Mgr., Lubricants Div.

■ **STAR OIL CO.**
2929 Lapeer Rd.
Port Huron, MI 48060
(313) 985-9586
Key: M; G, F, D, L
F. C. Kaiser, Chmn.
C. A. Kellerman, Pres.
Ed Shreiner, VP, Sec.

■ **STAR SERVICE & PETROLEUM CO.**
Box 1344
St. Louis, MO 63043
(314) 739-0026
Key: M; Gr
Cameron Henderson, Pres.
Clyton Lillier, VP
E. E. Hewson, VP

■ **STUART PETROLEUM CO.**
4646 40th Street, N.W.
Washington, DC 20016
(202) 537-8900
Key: T, M, O-Terminal Operator; G, F, D, L
Sub. of Stuart Investment Co.
L. P. Stuart II, Pres.
N. D. Potter, Sr. VP, Mktg.
Harry Youngling, VP, Fuel Oil Div.
Don Seyboft, Gen. Mgr., Retail Div.
Thomas Gaffney, VP, Supply-North
Ben Matthews, VP, Supply-South

■ **STORMY OIL CO.**
P.O. Box 1841
St. Cloud, MN 56302
(612) 251-6272
Key: M; G, F, D, L
Sub. of St. Augusta Oil Co.
Ronald Vukelich, Pres.
Patrick Tracey
James Tracey
Leslie Vukelich, Sec.

■ **STRIKER INDUSTRIES INC.**
285 Broadway-Gaslight Square
Saratoga Springs, NY 12866
(518) 587-1363
Key: M; Gw, Fw, Dw, Lw
Robert A. Noble, Pres.
Thomas J. Shea, Opns. Mgr.
William R. Fletcher, Sys. Mgr.
Earl C. Lucot, Acct. Mgr.
Judy Sullivan, Acct. Receiv. Mgr.

■ **SUBURBAN OIL CO.**
1301 W. 22nd St.
Oak Brook, IL 60521
(312) 325-9526
Key: M; G, F, D
John H. Curran, Pres.
Clyde F. Todd Jr., Mktg. VP
James W. Johnston, Sec.
P. G. Marra, Mgr., Admin. Svcs.

SUBURBAN PROPANE GAS CORP.

334 Madison Ave.
Morristown, NJ 07960
(201) 540-0300
Key: O-Propane Marketers
Sub. of National Dist. & Chemical Corp.
Mark J. Anton, Pres.
Salvatore G. Pastore, Exec. VP
Wm. Owen Jr., Sr. VP
Gerald M. Becker, Asst. VP
Robert M. Plante, Asst. VP
Kevin T. McIvers, Sec./Gen. Counsel

SUMRALL OIL SERVICES, INC.

P.O. Box 525
Bay Springs, MS 39422
(601) 764-2135
Key: M; Gr
James A. Jurnall, Pres. & CEO
James D. Milkins, Mktg. VP
Betty B. Sumrall, Sec./Treas.

SUN REFINING AND MARKETING COMPANY

1801 Market Street, 10 Penn Center
Philadelphia, PA 19102
(215) 977-3000
Key: I; G, F, D, LPG, L
Sub. of Sun Company, Inc., 100
Matsonford Road, Radnor, PA 19087
Subs: H. H. Palmer, Inc.
Kelly Company
Herr Gas & Oil Company
Mohawk Valley Oil, Inc.
Stop-N-Go Foods, Inc.
Montour Auto Service, Inc.
Mid-State Oil Co.
Thill Oil Sales
Masco Petroleum Co.
King Kwik Minit Market, Inc.

Sun Company Inc.

T. A. Burtis, Chmn.
T. A. Burtis, CEO
R. McClements Jr., CEO
R. McClements Jr., Pres.
G. E. Hillhouse, Exec. VP
J. P. Neufsey, Sr. VP, Finance
B. N. Rutherford, Sr. VP, Human Res. and Admin.
H. T. Snider, Sr. VP, Planning & Public Affs.
D. P. Walsh, Sr. VP & Gen. Counsel
R. H. Campbell, Group VP, Ref. & Mktg.
R. P. Hauptfuhrer, Group VP, Expl. & Prod.
R. W. Ince, Group VP, Energy Minerals
B. C. Lindsay, Group VP, Indus. Svcs. Gr.
R. A. Baillie, VP, Tech.
P. E. Coggins Jr., VP, Human Res.
T. D. Hadley Jr., VP, Mktg. Mgmt. & Admin.
A. T. Jlenzak, VP, Corp. Planning & Econ.
P. F. Wainwright, VP, Corp. Financing
T. L. Wylie, VP Gov. Rel.
D. J. Ainsworth, Corp. Sec.
J. A. Fritsch, Asst. Sec.
E. C. Gerner, Asst. Sec.
R. M. Aiken Jr., Comptroller
R. A. Paul Jr., Treas.
D. A. Kline, Asst. Treas.
A. S. Martin Jr., Gen. Auditor

Sun Refining and Marketing Co.

R. H. Campbell, Pres.
H. Alonso, VP
J. V. D. Fear, VP
J. D. Heims, VP
K. D. Hill, VP
G. D. Kirk, VP
D. E. Knoll, VP
N. J. Neuhausel, VP
J. K. Obolo, VP
D. C. Rippey, VP
H. Z. Shelton Jr., VP
T. Brownlie Jr., Sec.
M. J. De Santis, Asst. Sec.
E. C. Gerner, Asst. Sec.
C. L. Guard, Asst. Sec.
C. G. Schanz, Asst. Sec.
D. I. Hughes, Controller
R. H. Meredith, Asst. Controller
D. I. Hughes, Treas.
M. J. De Santis, Asst. Treas.
B. A. Kraig, Asst. Treas.
W. B. Priestley, Asst. Treas.
P. L. Renzulli, Asst. Treas.

SUNNY SERVICE STATIONS, INC.

P.O. Box 141
Eugene, OR 97440
(503) 746-9614
Key: M; G, D
Alan O. Maxwell, Pres.
Ellis E. Emory, VP
Thomas E. Golden, Sec./Treas.

SUNOCO INC.

56 Wellesley Street West
Toronto, Ontario Canada M5S 2S4
(416) 924-4111
Key: I; G, F, D, LPG, L
Sub. of Sunoco Inc.
S. A. Cowan, Exec. VP, Sunoco
C. K. Boland, VP, Mktg.
W. W. Gibson, Mgr., Retail Sls.
R. A. Hutchison, Mgr., Adv. & Merchandising

SUNSHINE JR. STORES

P.O. Box 2488
Panama City, FL 32401
(904) 769-1661
Key: M; Gr, Fr, Dr
L. Lewis-Brent, Pres.
K. White, Exec. VP
R. Lake, VP, Ret. Opns.
J. Burkhalter, Dir. Gas. Mktg.
R. Stephens, Purch. Agent
R. Landingham, Ret. Pricing

SUNY'S PETROLEUM INC.

200 Elgin Street, Suite 2
Ottawa, Ontario, K2P 1L5
(613) 244-3546
Key: T, M; G, F, D, LPG, L
Bertram Loeb, Chmn.
Kenneth J. McCrimmon, Pres.
William M. McInerney, VP
Brian D. Mulligan, VP, Finance

Brantford Division:

41 Gilmerson Street
Brantford, Ontario N3T 1Z8
(519) 759-2480

SUPER OIL CO.

P.O. Box 3039 CRS
Johnson City, TN 37602
(615) 926-2126
Key: M; Gr, Lr
Robt. Leonard Jr., Pres./Opns. Mgr.
R. Steven Leonard, Exec. VP
John Haynie, Supr.

SWANN OIL

67th St. & Schuykill River
Philadelphia, PA 19153
(215) 492-8000
Key: T, M; G, F
Subs: Asphalt & Petroleum Co.
Eastern Oil Transport
Northeast Industrial Oil Corp.
Swann Oil Inc. of Philadelphia
Swann Oil Inc. of N.C.
Swann Oil of VA
Leonard A. Swann, Jr., Pres.
Edward J. Gallagher, VP, Opns.
Michael J. Burke, VP, Mktg.
J. B. Maher, VP, Finance
G. R. Ritter, Controller

TANNER OIL CO.

620 So. Front St.
Ironton, OH 45438
(614) 532-9148
Key: M-Rich; Gr
Subs: Rich Oil Corp.
Tanco, Inc.
Rich of Ohio
Rich of West Virginia
Rich Terminal Co.
R. B. Tanner, Pms. & CEO

A. TARRICONE (ATI)

1337 Saw Mill River Rd.
Yonkers, NY 10710
(914) 478-5970
Key: T, M; G, F, D, LPG, L
Subs: Eagle Fuel
Tedone Fuel
Terrone Fuel
Bello Fuel
Empire Fuel
Mt. Pleasant Fuel
Viking Petroleum
Halstead-Quinn Fuel
Halstead-Quinn LPG
ATI Transportation
ATI Terminals
ATI Ltd. (International Shipping)
Rockland Fuel Oil
Peekskill Fuel Oil
ATI Gasoline
Blending Operations

Anthony Tarricone, Pres. & Chmn.
Anthony Tarricone, VP Sec./Treas.
Edwin Goldwasser, VP, Finance
Mick Bombasse, VP, Supply
Ben Davis, Credit Mgr.
Claire Tarricone, VP, Opns. & Admin.
Perry Garber, Comm. Sls. Mgr.
Michael Mushok, Mgr., Gasoline Mktg.

TAUBER OIL CO.

85 Waugh Dr. Suite 700
Houston, TX 77210
(713) 869-6700
Key: T, M; Gw, Fw, LPGw
O. J. Tauber Jr., Pres.
James N. Clark, VP, Petrochem
Bill Kile, VP, Petrochem
W. L. Saller, VP, LPG
Gerald Murray, VP, Mktg.
David Tauber, Exec. VP
Richard Tauber, Exec. VP
H. L. Mayes, VP, Crude Oil
Joseph Sassin, Controller

TAYLOR OIL CO.

P.O. Box 5195
Winston-Salem, NC 27103
(919) 725-9531
Key: M; Gr, Dr
Subs: ETNA Service Station
Triad Terminal Co.
John A. Taylor, Pres.
James E. Thompson, Exec. VP
Philip E. Rhynes, Treas.
John A. Taylor Jr., Mktg. Mgr.
Jerry W. Stanley, Opns. Mgr.

TCR, INC.

P.O. Box 13310
Eight Mile, AL 36613
(205) 457-6827
Key: M; G, Dr, Lr
Sub. of Texas City Refining Co., Inc.
R. M. Ponder, Gen. Mgr.
Calvin Puckett, Retail Mgr.

TEHNECO OIL COMPANY

PROCESSING & MARKETING
P.O. Box 2511
Houston, TX 77001
(713) 757-2131
Key: I; G, F, D, LPG, L
J. L. Keteisen, CEO
R. S. Cunningham, Pres.
H. H. Daniel, Sr. VP, Mktg.
N. H. McLaurin, VP, Retail Mktg.
S. C. Johnson, VP, Whlsl. Mktg.

TESORO PETROLEUM CORP.

8700 Tesoro Dr.
San Antonio, TX 78286
(512) 828-8484
Key: I; G, F, D, LPG, L
Subs: Tesoro Gasoline Mktg. Co.
Tesoro Petroleum Dist. Co.
Tesoro Alaska Petroleum Co.
Tesoro Refining, Mktg. and Sup. Co.
Robert V. West, Chmn./CEO
Z. D. Bonner, Vice Chmn.
Dennis F. Juran, Pres.
J. P. Schmalz, Exec. VP
Milton Young, Group VP
Jack Charles, Group VP
James F. Smith, Group VP
Donald N. Bonnachi, Sr. VP, Admin.
M. Richard Stewart, Sr. VP, Counsel
John J. Tagliano, Sr. VP, Ref.
E. W. Cromey, VP, Whlsl., Mktg. Supply
James R. Hyndyk, VP, Treas.
John M. Morgan, VP, Oil Field Supply
Eugene Nasch, VP, Ref. Mktg.
Edward R. Bardgett, VP, Alaska Opns.
William M. Sims, VP, Publ. Rels.
Perry Woolter, Sr. VP, Govt. Rels.

Tesoro Gasoline Marketing Co.

(Formerly Diges)
9201 W. Olympic Blvd.
Beverly Hills, CA 90212
(213) 278-2160
Eugene Nasch, Pres. & CEO
Earl Redmon, VP & Sls. Mgr.
Lyle Bitner, Opns. Mgr.

Tesoro Alaska Petroleum Co.

P.O. Box 8272
3380 C. St.
Anchorage, AK
Edward R. Bardgett, VP

P.O. Box 3691

Kenai, AK
Mark S. Necessary

Tesoro Petroleum Distributing Co.

P.O. Box 23278
Harahan, LA 70183
John H. Morgan, Exec. VP

Tesoro Refining, Marketing & Supply Co.

8700 Tesoro Dr.
San Antonio, TX 78286
John J. Tagliano, Sr. VP

9100 Wilshire Blvd., Suite 325

Beverly Hills, CA 90212
E. W. Cromey, Sr. VP
Steve Janzen, VP

TEXACO INC.

2000 Westchester Ave.
White Plains, NY 10650
(914) 253-4000
Key: I; G, F, LPG, L
Sub: Texaco Canada Inc.
John K. McKinley, Chmn. of Bd. of Dir.
J. W. Kinneare, Exec. VP & Vice Chmn.
A. C. DeCane Jr., Pres.

Texaco U.S.A.

1111 Rusk Avenue
Houston, TX 77002
(713) 650-4000
R. M. Routhier, Pres.
Robert R. McCall, Exec. VP
R. R. Dickinson, Sr. VP, Opns.
James M. Seaman, Jr. VP,
Downstream Op.
G. F. Rome, Sr. VP, Producing
F. A. Seamans, VP Explor. & Prod. Svcs.
R. H. Howell, VP, Manuf.
E. W. Gunnels, VP, Mktg.
T. H. Tepper, VP, Supply & Trans.
J. D. Annett, VP, Wash. Office
D. H. Schmude, VP, Tulsa Reg.

Boston Div.

P.O. Box 527
One University Park
Waltham, MA 02254
(617) 894-8010
J. G. Curry, Div. Mgr.

New York Div.

580 White Plains Rd.
Tarrytown, NY 10591
(914) 332-1000
L. B. Jackson, Div. Mgr.

Philadelphia Div.

303 Fellowship Rd.
Moorestown, NJ 08057
(609) 778-1400
R. R. Campbell, Div. Mgr.

Washington Div.

3800 Pickart Rd.
Fairfax, VA 22031
(703) 425-6800
G. B. McGraw, Div. Mgr.

Midwestern Reg.

1515 West 22nd St.
Oak Brook, IL 60521
(312) 920-9850
F. B. Stanley, Reg. Mktg. Mgr.

Midwest Lubricants Div.

290 S. Butterfield Rd.
Oak Brook, IL 60521
(312) 654-4630
R. A. Edmonds, Div. Mgr.

Tulsa Region

1437 South Boulder
Tulsa, OK 74119
(918) 560-6000
R. K. Tieman, Reg. Mktg. Mgr.

Southern Reg.

1111 Rusk St.
Houston, TX 77002
(713) 650-4000
R. J. Fisher, Reg. Mktg. Mgr.

Atlanta Div.

58 Executive Park South, N.E.
P.O. Box 4528
Atlanta, GA 30329
(404) 321-4411
J. W. Nay, Div. Mgr.

Orlando Div.

3555 Maguire Blvd.
P.O. Box 20734
Orlando, FL 32814
(305) 894-8411
A. L. Darden, Div. Mgr.

New Orleans Div.

4051 Vets Memorial Blvd.
P.O. Box 7747
Metairie, LA 70011
(504) 885-7200
J. H. Brown, Div. Mgr.

Dallas Div.

2915 LBJ Freeway (I-635)
Brookhaven Office Pk. (W)
P.O. Box 34200
Dallas, TX 75234
(214) 241-0056
D. E. Fletcher, Div. Mgr.

Houston Div.

2000 North Loop W
Houston, TX 77018
(713) 866-1311
R. L. Ebert, Div. Mgr.

Los Angeles Div.
3350 Wilshire Blvd.
Los Angeles, CA 90010
(213) 345-0515
C. T. Trammell, Div. Mgr.

Seattle Div.
10602 N.E. 38th Pl.
Kirkland, WA 98033
(206) 827-0761
R. A. Sovereign, Div. Mgr.

TEXACO, CANADA
90 Wynford Drive
Don Mills, Ontario, Canada M3C 1K5
(416) 443-7800
Key: I: G, F, D, LPG, L
Sub of: Texaco, Inc.
J. L. Dunlap, Pres. & CEO
S. J. Walker, Sr. VP
S. T. O'Farrell, VP, Mktg.
J. M. Chantler, Gen. Mgr., Mgt.
R. M. Cooley, Asst. VP, Mktg.
J. J. Brill, Mgr., Distrib. & Devel.
B. S. Hawkins, Mgr., Mktg. Resources
E. R. Glew, Coord. Aviation
H. T. Walton, Mgr., Admin. & Systems
G. A. Monk, Mgr., Opns. Center
D. C. McLachlan, Mgr., Sys. Promo.
S. G. Ecclestone, Coord. Mktg. Prgms. & Training
G. M. Hogan, Mgr., Mktg. Png.

TEXAS CITY REFINING, INC.
P.O. Box 1271
Texas City, TX 77530
(409) 945-4451
Key: R, M, G, Fw, D, LPGw
Alan T. Rowe, Pres.
M. Clay Chambers, VP, Sls. & Supply
J. L. Stratman, Sr. VP
R. L. Williams, VP, Finance
C. J. Schmitz, VP, Supply
S. C. Boyd, Mgr., Sls.
E. J. Count, Mgr., Prod. Trading
D. A. Sakey, Mgr., Distrib.

TEXAS STAR OIL COMPANY
P.O. Box 151
Corpus Christi, TX 78403
(512) 852-3311
Key: T, R, M; G, D, L
Sub: Texas Star Investments
Garrett T. Brooks, Pres.
J. Pat Lackey, VP
Jack McCord, Sec. Treas.
Dick Fogle, Controller
Mark Levine, Merchandising Mgr.
Bill Arrington, Mgr., Fuel Div.
Speedy Hill, Mgr., Transportation

THORNHILL OIL COMPANY, INC.
P.O. Box 5034
Fort Wayne, IN 46895
(219) 432-9407
Key: M; G, F, D, L
Sub: Smith Petroleum Inc.
Robert J. Thornhill, Pres.
James Couture, Gen. Mgr., Thornhill Oil Co., Inc.
Lonnie Wilson, Gen. Mgr., Smith Petroleum Inc.

THORNTON OIL CORP.
10101 Linn Stn. Rd.
Louisville, KY 40223
(502) 425-8022
Key: M; Gr, Dr
James H. Thornton, Chmn.
Paul J. Perconti, Pres.
Brenda M. Stackhouse, VP., Purch.
J. Stanley Clark, Controller
Robert A. Iezzi, VP, Opns.
Richard A. Snider, VP, Mktg.

THRIFTY OIL CO.
10000 Lakewood Blvd.
Downey, CA 90240
(213) 923-9878
Key: R, M; G
Sub: Golden West Refining Co.
Ted Orden, Chmn. & CEO
John E. Elgin, Sr. VP, Finance
T. R. Latham, VP, Fin. & Acct.

Retail Operations:
Robert Drew, Exec. VP
R. T. Fiech, VP
Van Tarver, VP, Convenience Stores

Refinery Operations:
James Flockhart, Sr. VP, Oper.
J. Roger Kemple, Sr. VP
John Miller, VP, Sls. Mgr.
Bob Redd, VP, Crude Oil
Barry W. Berkett, VP, & Gen. Counsel

TIME OIL CO.
2737 West Commodore Way
Seattle, WA 98199
(206) 285-2400
Aff: U.S. Oil & Ref. Co.
R. D. Abendroth, Pres. & Chmn.
Wayne Miller, Retail Sls. Mgr.
Robert D. Abendroth, Opns. Mgr.
A. A. Schneider, Real Estate Mgr.
Chuck Combe, Whsl. Sls. Mgr.

Los Angeles Office
5150 Wilshire Blvd.
Los Angeles, CA 90036
(213) 938-7151
H. Roger Holliday, Mgr., Trans. Sup.

No. California Div.
488 Wright Ave.
Richmond, CA 94802

Oregon Div.
12005 N. Burgard
Portland, OR
Neil Wallis, Term. Mgr.

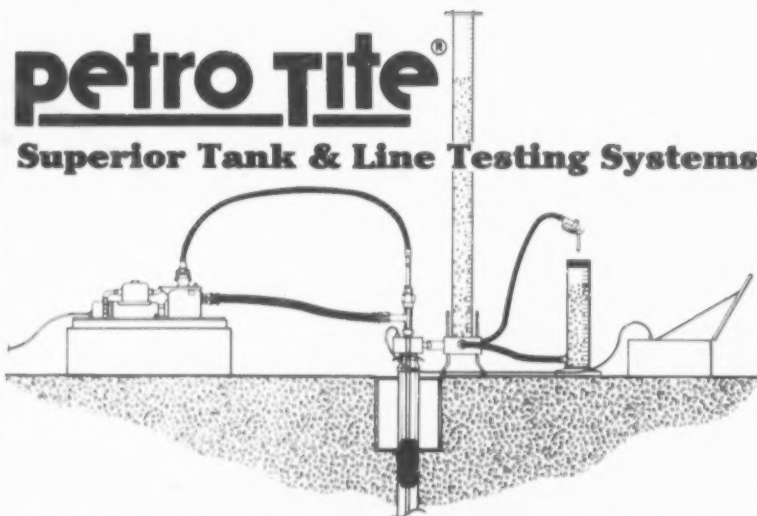
TIMES OIL CORP.
P.O. Box 795
Lincolnton, NC 28092
(704) 735-3092
Key: M; G, F, D, L
Subs: Eaton Oil Co.
Hugh Paschal Oil Co.
Times Oil Co. of Reidville
Dan M. Boyd III, Pres. & CEO
William G. Boyd, Exec. VP
Bill Massey, Mktg. VP & Gen. Sls. Mgr.

T. J. TERMINALS CORP.
P.O. Box 2775
Topeka, KS 66601
(913) 233-0881
Key: M
Dale Miller, Exec. VP
Bill Oliver, Av. Sls.

TOOLEY OIL COMPANY
P.O. Box 255525
Sacramento, CA 95825
(916) 929-9351
Key: M; Gr
Michael C. Tooley, Pres. & CEO

petro tite®

Superior Tank & Line Testing Systems



Heath's PETRO TITE tests underground fuel and liquid tanks for leaks with far greater accuracy than the results outlined in NFPA Standard 329 Precision Test requirements.*

The PETRO TITE System includes the sensitive and necessary equipment to measure and adjust for variables such as temperature, tank end deflection, type of liquid, water table, etc.

The Heath PETRO TITE System develops hard data, not assumptions or "rule of thumb" variables, to produce accurate and superior tank testing results.

Field operated and refined over a period of 15 years, the Heath PETRO TITE Tank and Line Testing Systems are not only, by far, the most experienced and widely-used systems, their results are accepted as authoritative by nearly all U.S. fire marshals.

*The Tank Testing System that meets test requirements and beats result requirements as outlined in the National Fire Protection Association Standard 329 Precision Test.

For complete details on the PETRO TITE Tank Tester and the PETRO TITE Line Tester, please call or write:



Heath Consultants Incorporated
100 Tosca Drive
P.O. BOX CS-200, Dept. NPNF
Stoughton, MA 02072-1591
617 344-1400 TELEX 924486

Heath Consultants Limited
954 Leathorne Street
London, Ontario
Canada, N5Z 3M5
519 686-6446



And We Have Regional Offices:

West Sacramento • Belle Vernon (Pittsburgh) • Houston
• Omaha • Nashville • New Castle, Ind. • Stoughton, Massachusetts

TORCO OIL CO.

624 S. Michigan Ave.
Chicago, IL 60605
(312) 341-1800

TOSCO CORPORATION

2401 Calersden Blvd.
P.O. Box 2401
Santa Monica, CA 90406-2401
(213) 207-6000
Key: R. M. Gw, Fw, Dw, LPGw
Matthew J. Talbot, Pres. & CEO
H. L. Langdon, Exec. VP, Sup., Ref. & Mktg.
W. A. Floyd, VP, Mktg. & Prod. Sup.
J. G. Drosdick, VP, Ref.
D. A. Leafstedt, Sr. P. Fin. & Admin.
L. M. Brown, Mgr., Nat'l. Sta.
L. V. Avalikian, Mgr., Whlsl. Sta., West
M. R. Zigich, Gen. Mgr., Prod. Sup. & Distrib.
D. J. Layton, Mgr., Whlsl. Sta., East

TOTAL PETROLEUM, INC.

999 16th Street
P.O. Box 500
Denver, CO 80201
(303) 281-2000
Key: T. G. F. D. LPGw, L.
Sub. of Total Petroleum (North America) Ltd.
Philippe Dunoyer, Pres.
Kenneth Buckler, Exec. VP, Petro. Prod.
Jeffrey L. Kramer, VP, Whlsl. Mktg. & Prod. Supply
Wilfred B. Heiland, VP, Retail Mktg.
Walt Wilson, Western Reg. Mgr.
Lynn Ressegue, Eastern Reg. Mgr.
David Strong, Central Reg. Mgr.

Distributor and Industrial Division

William Gooding, Gen. Mgr.
H. T. Fisher, Branded Distrib. Mgr.
J. L. Steere, Unbranded & Ind. Sta. Mgr.

APCO Division

C. M. Perry, Central Reg. Mgr.
D. G. Wright, Gen. Mgr.
M. C. Peterson, Northern Reg. Mgr.

TOWN PUMP INC. & AFFILIATES

600 South Main Street
Butte, MT 59701
(406) 723-5419
Key: T. M. G. F. D. LPG, Lr
Thomas F. Kenneally, Pres.
J. M. Kenneally, VP, Whlsl. & Mktg.
Dan J. Kenneally, Gen. Mgr.
Kevin Kenneally, Optrs. Mgr.

TRANSIT OIL COMPANY

1002 S. Brook St.
Louisville, KY 40203
(502) 584-0101
Key: M. G. F. D. LPG, Lr

TRAVELERS PETROLEUM, INC.

2315 N. Main Street, Suite 224
P.O. Box 1426
Anderson, SC 29622
(803) 225-4676
Key: M. G. F. D. L
Joe F. Brandt, Pres.

TRENTON OIL CO., INC.

1463 Lambert Rd.
Trenton, NJ 08611
(609) 695-1220
Key: M. G. D, Lw
Cyril P. Forbes, Pres.
John R. Knapsack, VP

TRESLER OIL CO.

4050 River Rd.
Cincinnati, OH 45204
(513) 347-1234
Key: M. Gw, Fw, Dw, Lw
Sub. of Ashland Oil, Inc.
Donald P. Krumme, Sr. VP
Tony Elsass, Reg. Sta. Mgr., Fleet Sta.
Lee Dunbar, Reg. Sta. Mgr., Refinery Sta.
Lynn Ernat, Asst. VP, Optrs.

TRITON INCORPORATED

4267 Winters Chapel Road
P.O. Box 276
Doraville, GA 30062
(404) 457-7271
Key: M. G. Fw, D
T. V. Patton, Pres.
Don R. Gilliam, Exec. VP, Fin.
J. L. Conine, Sr. VP, Real Estate
Dennis P. Gagnon, Exec. VP, Sta. & Optrs.

TRYON OIL COMPANY

P.O. Box M
Johnstown, NY 13095
(518) 382-0290
Key: M. G. F. D
Sub. of J. H. Buhrmaster Co., Inc.
James R. Buhrmaster, Pres.

TURBO RESOURCES LIMITED

400, 609-14 Street N.W.
Calgary, Alberta T2N 2A1
(403) 283-6202
Key: R. M. G. F. D. LPG, L
Norman R. Gish, Pres. & Chmn. of Bd.
Bruce P. R. Millar, VP, Mktg.
Robert McClinton, VP, Fin. & Admin.
Gerald Sioui, VP, Sup. & Distrib.
Paul Core, VP, Refining
Don Schafer, Retail Mktg. Mgr.
John Jenkins, Whlsl. Mktg. Mgr.
Gordon McCaig, Gen. Mgr., Freeway Trans.

Marketing Regions:**Northern Alberta Marketing Region**

9637 45th Avenue
Edmonton, Alberta T6E 5Y9
(403) 436-3160
Alan Petersmeyer, Region Mgr.

Southern Alberta Marketing Region

3805 29th Street N.E.
Calgary, Alberta T1Y 6B5
(403) 291-3400
Dennis Schimanowsky, Region Mgr.

Prairie Marketing Region

3047 Millar Avenue
Saskatoon, Saskatchewan S7K 6G5
(306) 934-3600
Mark Gibson, Region Mgr.

Pacific Marketing Region

7677A-132nd Street
Surrey, British Columbia V3W 4M8
(604) 590-1581
Richard Fernuk, Region Mgr.

Wholesale Marketing Region

400, 609-14th Street N.W.
Calgary, Alberta T2N 2A1
(403) 283-6202
Art Ripley, Region Mgr.

ULTRAMAR CANADA INC.

1 Valleybrook Drive
Don Mills, Ontario M3B 2S8
(416) 445-2515
Key: R. M. G. F. D. LPGw, L
Sub. of Canadian Ultramar Limited
Subs: Ultramar Holdings Limited
Ultramar PLC
Laurie Woodruff, Pres.
James Airth, VP, Ref. Sta.
Max Bayer, VP, Fin. & Admin.
Arthur Dickinson, VP, Corp. Rel.
John Fisher, VP, Refining
Peter Maitland, VP, Corp. Devel.
Darrel McLaughlin, VP, Mktg.
John Robertson, VP, Supply

ULTRAMAR PETROLEUM INC.

135 Chestnut Ridge Road
Montvale, NJ 07645
(201) 573-0300
Key: M. G. F. D
Sub. of American Ultramar Ltd.
Subs: Pittston Marine Transport Corp.
Sinram Marris Oil Co. Inc.
W. L. Mannion, Pres.
J. F. Tower Jr., Sr. VP
P. J. Colapinto, VP, Sup. & Distrib.
J. C. Foster, VP, Optrs.
D. F. Walton, VP, Finance
W. L. Deloria, Gen. Sta. Mgr.
G. Graham, Gen. Mgr., Motor Fuels

UNION OIL COMPANY OF CALIFORNIA

P.O. Box 7600
Los Angeles, CA 90017
(213) 977-7000
Key: I. G. F. D. LPGw, L
Sub. of Unocal Corp.
Fred Hartley, Pres. & CEO
W. S. McConner, Sr. VP & Pres. Union 76 Div.
C. R. Warnock, VP, Mktg., Western Reg.
T. W. Matthews, VP, Mktg., Eastern Reg.
T. R. Seden, Adv. Mgr.
Karen Sikkema, Dir., Corp. Communications

Union 76 Division

Union Oil Co. of Calif.
1650 East Golf Rd.
Schaumburg, IL 60196
(312) 885-7676
Key: I. G. F. LPG, L
W. S. McConner, Pres. (Located in Los Angeles)
R. C. Beach, VP, Crude Supply Div't. (Los Angeles)
W. F. Krick, Reg. Mgr., Gov't. Rel.
R. N. Creek, VP, Admin.
G. H. O'Leary, Gen. Mgr., Credit Card Optrs. (Located in San Francisco)
W. E. Branstrom, Dir., Ping. (Located in Los Angeles)
T. R. Seden, Mgr., Adv. (Los Angeles)
J. W. Groesch, Mgr., Mktg. Information
R. E. Robbins, VP, Nat'l. Mktg.
C. C. Petray, Gen. Mgr., Truck Industry & Interstate Sta.
J. P. Hill Jr., Gen. Mgr., Nat. Gas Liquids (Houston)
K. R. Barton II, Mgr., Comm'l. Credit

Eastern Region

1650 East Golf Rd.
Schaumburg, IL 60196
(312) 885-7676
R. F. Nootbaar Jr., Sr. VP, Ref. & Mktg.
T. W. Matthews, VP, Mktg.
R. R. Runge, VP, Ref. & Trans.
J. A. Mihalek, Gen. Mgr., Purch. & Admin. Svcs.
F. L. Walker, Gen. Mgr., Mktg.
P. D. Fieser, Gen. Mgr., Mktg. Distrib.
D. C. Eichten, Reg. Mgr., Interstate Auto Truck Stops
M. S. Podgurski, Mgr., Mktg. Ping.
R. H. Smith, Mgr., Mktg., Engr. & Constr.
A. D. Littlejohn, Mgr., Mktg. Ref.
W. H. Kees, Mgr., Mktg. Trans.

Atlanta (GA 30302)

13 Corporate Sq., N.E.
R. J. Mertz, Div. Sta. Mgr.

Chicago

2060 Stonington Ave.
Hoffman Estates, IL 60172
C. W. Osborne, Div. Sta. Mgr.

Western Region

P.O. Box 7600
Los Angeles, CA 90054
(213) 977-7600
D. L. Hanley, Sr. VP, Ref. & Mktg.
C. R. Warnock, VP, Mktg.
E. P. Barnett, VP, Ref. & Supply
W. A. Fyock, Gen. Mgr., Mktg.
J. H. Vanderveen, Mgr., Whlsl. Sta. & Supply
L. L. Krohn, Mgr., Mktg. Distrib.
C. C. Row, Mgr., Mktg. Real Estate
G. S. Hoyt, Mgr. Purchasing
J. W. Mullen, Mgr., Mktg. Admin.
P. J. McDowell, Reg. Mgr., Interstate Auto/Truckstops

Northern-Calif. Div.

One California St.
San Francisco, CA 94111
R. D. Burnham, Div. Sta. Mgr.

Los Angeles Div.

3701 Wilshire Blvd.
Los Angeles, CA 90010
J. M. Peck, Div. Sta. Mgr.

Northwest Div.

2901 Western Ave.
Seattle, WA 98121
D. W. Lamb, Div. Sta. Mgr.

Continental Div.

123 Camino de la Reina
San Diego, CA 92108
J. C. Robertson, Div. Sta. Mgr.

Hawaii Dist.

841 Bishop St., Suite 2204
Honolulu, HI 96813
W. M. Schreve, Dist. Sta. Mgr.

Union Chemicals Div.

Union Oil Co. of Calif.
461 So. Boylston St.
Los Angeles, CA 90017
(213) 977-7600
Key: M. Petrochemicals
T. C. Henderson, Pres.
K. L. Openshaw, Sr. VP, Carbon
L. S. Pierson, Sr. VP, Nitrogen
O. C. Mauthe, Adv. Mgr.

Sign up

...with the leader in
gas price signs
& decals.



Box 2082 Ft. Worth, TX 76113

1-800-433-5663

IN TEXAS 1-817-336-5671

FREE CATALOG



National Petroleum News 75th Anniversary Special Commemorative Limited Edition



Delivered on Time



Mechanic on Duty



Double Stamps on Tuesday



10 Gallon Limit

To celebrate our 75th anniversary, National Petroleum News commissioned artist Jack Schmitt N.W.S. to create 4 special paintings of importance to the Petroleum Industry. A lot of history has been reported on the pages of NPN since 1909 and the artist has illustrated 4 eventful eras in his authentic and carefully detailed paintings.

The paintings have been made available in a very small limited edition of only 250 signed and numbered collector prints and 20 signed artist

proofs. These colorful fine art prints are of the finest quality, on 100% rag paper, and are a faithful reproduction of the original paintings. A certificate of authenticity guarantees that this is a one time special limited edition of 250 and will not be available ever again when it has sold out. Print image measures 15½ x 22. Prints may be ordered individually for \$50 each, or at a special anniversary price for the set of 4 for \$180, plus \$4 each order for shipping.

Send to: NPN 75th Anniversary Prints • P.O. Box 894 • Mount Prospect, IL 60056

FB685

Please send me:

- ☐ Delivered on Time ☐ Double Stamps on Tuesday
☐ Mechanic on Duty ☐ 10 Gallon Limit
☐ Set of 4—Special price 4 for \$180

☐ Payment enclosed ☐ Visa ☐ Mastercard

Sub Total _____

Shipping each \$ 4.00

Ill. Residents add 7% sales tax _____

Allow 4 to 6 weeks for delivery Total Amount _____

CARD NO. _____ EXP. DATE _____

SIGNATURE _____

NAME _____

ADDRESS _____

CITY _____

STATE _____ ZIP _____

To order extra copies of the 1985 NPN Factbook

Simply return this card with
your payment to National
Petroleum News.

☐ Payment enclosed ☐ Bill me

Send me _____ copies

(1 copy \$35.00)

(2-5 copies \$52.50)

(6-10 copies \$80.00)



Name _____

Title _____

Firm _____

Co. Name _____

Address _____

City _____

State _____ Zip _____

YES ...

enter my subscription to National Petroleum
News for one year at \$44.00.

☐ Check here for 3 years for \$112.00
include my free convenience stores
book. SAVE yourself \$20.00
For one year: Canada US \$53.00
Other countries: \$84.50

☐ Payment Enclosed ☐ Bill Company ☐ Bill Me

☐ Mr.
Name ☐ Mrs. _____
☐ Ms. _____

Title or Position _____ Phone No. _____

All spaces must be filled in before service starts

Firm or Company Name _____

If self-employed, please write "SELF" above

Company Address _____

City _____ State _____ Zip _____

NATURE OF BUSINESS. PLEASE CHECK ONE OF THE FOLLOWING

☐ Oil Jobber/Distributor ☐ Integrated Oil Company
☐ Equipment Manufacturer and/or Distributor ☐ Convenience Store Operation

☐ Other (Please explain) _____

☐ Check here if you want NPN sent to your home address:

Home Address _____

City _____ State _____ Zip _____

Subscription rates above apply to managers marketing
petroleum and allied products. All others \$59.00 a year.
Please allow four to twelve weeks for shipment.

Charge My Subscription to

☐ American Express ☐ Visa
☐ MasterCard ☐ Interbank No. _____
Acct. No. _____
Date Card Expires _____
Signature _____

If American Express is used, please return this
subscription in sealed envelope.

FB85

199



NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

BUSINESS REPLY MAIL

FIRST CLASS PERMIT NO. 99 DES PLAINES, IL

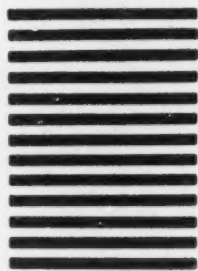
POSTAGE WILL BE PAID BY ADDRESSEE

NPN

NATIONAL PETROLEUM NEWS

950 LEE ST.

DES PLAINES, IL 60016



200

Petrochemical Group
1345 N. Meacham Rd.
Schaumburg, IL 60196
(312) 885-5450
N. E. Lynam, Sr. VP
W. F. Murphy, Mktg. VP

Regions

Northeastern Reg.
87 Walnut Ave.
Clark, NJ 07066
F. R. Daugherty, Gen. Mgr.

Midwestern Reg.
One Continental Tower
Suite 507, 1701 Golf Rd.
Rolling Meadows, IL 60008
A. F. Schroeder, Gen. Mgr.

Southeastern Reg.
17 Executive Park Dr., N.E.
Atlanta, GA 30329
P. F. Lundblad, Gen. Mgr.

Southwestern Reg.
16825 W. Chase Blvd.
Suite 580
Houston, TX 77058
C. E. Cook, Gen. Mgr.

Western Reg.
14445 Alondra Blvd.
La Mirada, CA 90638
D. R. Love, VP & Gen. Mgr.

International Div.
1900 E. Golf Rd.
Schaumburg, IL 60195
D. J. Henry, Gen. Mgr.

UNITED MARKETING CO.
P.O. Box 107
Lakewood, NY 14750
(716) 763-8568
Key: R, M; G, F, D
Sub. of United Refining Co.
William Sudhaus, Pres.
James Sadler, Exec. VP
Ashton Dittka, VP, Prod. Sls.
Richard Shaw, Dir., Retail Mktg.

UNITED OIL INDUSTRIES
P.O. Box 22673
Jackson, MS 39205
(601) 373-3370
Key: M; Gw
B. L. Harkness, Pres.

UNITED REFINING CO.
P.O. Box 943
Warren, PA 15085
(814) 723-1500
Key: R, M; G, F, D, LPGw, Lr
David B. Chalmers, Chmn. & CEO
William S. Sudhaus, Pres. & COO
James E. Sadler, Exec. VP Mktg. &
Real Estate
Peter J. Hunter, Exec. VP, Supply &
Distrib.
Robert A. Wenom, Sr. VP, Ref.
Ashton Dittka, VP, Whlsl. Sls.
Steve Widmer, VP, Supply & Distrib.
Richard Shaw, Dir. Gen. Mgr., Retail
Henry Fuksman, Merch. Mgr.

UNITED STATES OIL CO., INC.
P.O. Box 777
South Boston, VA 24092
(804) 432-0251
Key: M; G, D, Lr
Sub. of Chatham Oil Co.
Edward L. Evans, Pres.
Ben J. Davenport Jr., Sec.-Treas.

UNIVERSAL UTILITIES
P.O. Box 456
240 East Shore Rd.
Great Neck, NY 11022
(516) 482-9400
Key: M; F
Albert Shapiro, Pres.
Harold D. Shapiro, Exec. VP
Joseph Shapiro, Exec. VP

V-1 OIL CO.
P.O. Box 2436
Idaho Falls, ID 83403
(208) 522-1210
Key: T, R, M; LPG
Sam H. Bennion, Pres. & CEO
Gary Huskinson, VP

VALVOLINE OIL CO.
P.O. Box 14000
Lexington, KY 40512
(606) 288-7000
Key: M; L
Sub. of Ashland Oil, Inc.
J. F. Boehm, Pres.
R. H. Long, Exec. VP
J. B. Baylor, Sr. VP, Supply & Opls.
J. D. Barr, Sr. VP, Sls.
C. F. Frey, Sr. VP, Mktg.
J. D. Kellner, Grp. Exec. Asst.

VAN DYNE OIL CO.
118 Center St.
Troy, PA 19947
(717) 297-2151
Key: M; Gw, F, D, L
Osmun Skinner, Pres./Treas.
Stephen J. Skinner, VP
Nicholas Deleuro, Sls. Mgr.

VICKSBURG REFINING INC.
P.O. Box 1343
Vicksburg, MS 39180
(601) 636-8520
Key: R, M; Fw, D, W
Sub.: Delta Comfort Products
M. J. Chaney, Pres.
B. A. Holman, Exec. VP
S. T. Loranth, VP, Ref.

VULCAN ASPHALT REFINING CO.
Box 388
Cordova, AL 35560
(205) 483-9282
Key: R, M; F, D
Sub. of United Ref. Co.
Edward J. Webb, Sr. VP
Melvin P. Kacharos, VP Fin.
Irwin W. Watkins Jr., VP, Sls.
Gary Roberts, Supt.

WACO OIL CO., INC.
219 Garrard St.
Covington, KY 41011
(606) 581-6226
Key: M; G, F, D
Don Conrad, Pres.
Giles Conrad, Exec. VP
John Gilbert, VP, Mktg. C-Stores
Timothy Reuter, Controller
Barbara A. Sumner, Purchaser

WAKE UP OIL CO., INC.
P.O. Box 68430
Indianapolis, IN 46268
(317) 872-5505
Key: M; G, Dr
James A. Hogshire III, Pres.
Ralph Y. Metcalf Jr., VP
Richard L. Hypes, Sec.

WARELUBCO, INC.
831 So. East, Box 1287
Jacksonville, FL 32251
(217) 245-9528
Key: T, M; G, Dr, Fr, L
Richard Ware, Chmn. & CEO
Ralph McNaughton, Pres.
Jon Ware, Exec. VP, Sec.
Wm. Ware, Exec. VP
Charles Smith, VP, Opls.

MALCO TEACHES AN OLD CARD NEW TRICKS

With the magnetic transaction card fast becoming "modern man's best friend," Malco makes a best friend even better.

Our technical magicians, in an effort to provide you with the very best, developed the MagnaShield™ card—utilizing Malco's state-of-the-art "tricks of the trade."

FIRST TRICK: BE MORE DEPENDABLE

To improve dependability, we added a tough acrylic coating to the card. It protects the magnetic stripe, and its valuable data, from the cruelties of today's transaction card environment. And gives the card the durability it needs to handle heavy use—year in and year out.

SECOND TRICK: BE MORE RELIABLE

You can't afford a card that's going to play dead in your card readers. From its first day forward, a MagnaShield card performs like no other. The application process actually laminates the magnetic stripe into the card—ensuring that the stripe comes into smooth, even contact with read heads.

Tests show that MagnaShield cards offer more accurate performance in all types of card readers.

THIRD TRICK: BE STRONGER

MagnaShield cards have higher initial signal strength than conventional "hot-stamp" cards—the signal starts stronger and remains more readable throughout the life of the card.

FOURTH TRICK: BE THE TOP DOG

MagnaShield cards come from Malco Plastics, the world's largest manufacturer of quality magnetic transaction cards. With over 30 years of manufacturing experience and an outstanding card processing center, you will benefit from Malco's ability to provide Total Card Services in one ultra-secure facility.

Make your next card issue MagnaShield—extra performance at no extra cost.

Then sit back and relax. Let MagnaShield perform for you and your cardholders.



**Malco
Plastics**

Plastics Park, Garrison, Maryland 21055
1-800-638-6198

MagnaShield cards exceed ANSI/ISO/ABA standards and all major equipment manufacturer's requirements.



■GEORGE E. WARREN CORP.

50 Milk Street
Boston, MA 02109
(617) 451-2300
Key: M; G, W, D, Fw
David C. Goldman, Chmn.
A. David Stillman, Pres. & Treas.
Richard A. Wentworth, Sr. VP-Mktg.
Thomas L. Carr, VP-Adm.
S. John Connolly, Buik. Sys. Mgr.
G. F. St. John, Mgr. Heavy Fuels &
Ref. Feed Stocks
Charles J. Carroll, Jr., Trader-Midwest
Byron R. Dunker, Wheel. Sys. Mgr.
F. Michael Masurati III, Sis. Rep.
Kent M. Hakanson, Sis. Rep.-New
England
Harry D. LaBar, Sis. Rep.-Mid-Atlantic
William G. Davidson, Opns. Mgr.
Brian M. Fogarty, Prod. Scheduler
Charles R. Mosher, Prod. Scheduler
Alison A. Bedula, Prod. Scheduler
David R. Laehn, Admin. Mgr.
Virginia M. Cheney, Asst. Admin. Mgr.
Rita J. Doucette, Sr. Admin. Coord.
Kathy M. Lawrence, Admin. Coord.
Kimberlee D. Ellis, Admin. Coord.
Debra A. McDonald, Admin. Coord.
Jonathan W. Taylor, Controller
Cynthia A. Coveil, Asst. to the Chmn.
of the Board, Asst. Clerk
Martin L. Paris, Asst. Controller
Gerald P. Sudell, Credit Mgr.
Francis J. Corsaro, Asst. Credit
Mgr.-Trade
Thomas J. Feely, Asst. Credit
Mgr.-Rack
Shirley E. Britton, Asst. Collections
Mgr.-Trade
James P. Sharp, Tax Mgr.
Kim M. Sedzia, Asst. Tax Mgr.
Geraldine A. Falvey, Accounts Payable
Mgr.
William A. Macone, Internal Auditor
Laura Hindmarsh, Trading Accountant
Kathryn M. Kenney, Asst. in
Accounting-Trade

Jeanne D. Comeau, Systems Mgr.
Fath L. Ralman, Rating Asst.
Stephen R. Somers, Corporate
Accountant
Richard C. McHale
Telecommunications and M.I.S. Mgr.
Scott M. Van de Mark, Trading Analyst
Rebecca L. Brockett, Communications
Cheryl D. Campbell, Communications
Stephanie A. Barnes, Communications

■WARREN EQUITIES, INC.

10 E. 53rd St.
New York, NY 10022
(212) 751-5100
Key: T, M; G, F, D, L
Subs: Kanyon Oil Co.
Puritan Oil Co.
Drake Petroleum Co.
Mid-Valley Petroleum
Warren Oil Co.
Warren Petroleum Corp.
W. Alpert, Chmn.
E. M. Cosgrove, Pres.
H. Kaplan, Exec. VP
A. Letizia, VP, Mktg., N.E.
S. Simmons, VP Regs. & Fin.
P. Caprese, Treas.
C. F. Hutchinson, VP, Mktg. NY
S. A. Snider, VP, Mktg., NJ
T. Player, VP, Mktg., PA
Dennis Soulin, Supply & Distrib.
F. K. LaForge, VP, Mktg. C-Stores

■WAWAHO OIL CO.

P.O. Box 56
Lacey's Spring, AL 35754
(205) 881-3621
Key: M; G, D, L
Walter V. Hough Sr., Pres.
Walter V. Hough Jr., Sec./Treas.

■WEBACO OIL CO., INC.

P.O. Box 312
Webster, NY 14580
(716) 872-2121
Key: M; G, D, L
Herbert L. Ingersoll, Pres.
Gerald R. Pinkley, VP

■WEBB OIL CO.

2975 Bay Road #105A
Seguin, MI 48803
(517) 790-8344
Key: M; G, D, F
William J. Webb Jr., Pres.
Robert J. Webb, Treas.
Eric G. Marple, VP

■WEBSTER OIL CO.

P.O. Box 10486
Springfield, MO 65808
(417) 883-2666
Key: M; G, F, D, L
Ernest Jack Webster II, Chmn.
James H. Dowell, Chmn.
Ernest Jack Webster III, Pres.
Robert M. Boyar, Field Rep.
Mark McConnell, Telemktg. Rep.
Thomas Webster, Dispatcher

■WESSON, INC.

P.O. Box 2127
Waterbury, CT 06722
(203) 756-7041
Key: M; G, F, D, L
Robert W. Wesson, Pres.
Roger Boucher, VP

■WEST PENN OIL CO., INC.

P.O. Box 605
Warren, PA 16385
(610) 723-9000
Key: O-Independent Lubr. Mgt.; L
Larry A. Lang, Pres. & CEO
John Hayes, Gen. Sts. Mgr.

■WESTERN MARKETING, INC.

P.O. Box 147
Arlene, TX 79804
(915) 677-2774
Key: M; G, D, L
W. P. Wright Jr., CEO
J. D. Naler, Pres.
J. R. Thacker, Exec. VP
R. T. Densby, VP
Richard Hasten, VP

■WESTERN PETROLEUM CO.

9531 W. 78th Street
Eden Prairie, MN 55344
(612) 941-6080
Key: M; G, Fw, D, LPGw
James W. Emison, Pres.
Richard W. Carthaus, Exec. VP
Richard S. Neville, VP, Mktg.
Wayne E. Johnson, Corp. Acct. Mgr.
Robert Forrest, Supply Mgr.

■WHALECO

One Corley Street
Brooklyn, NY 11231
(718) 852-7000
Key: T, M; G, F, Dr
Airs.: Whale Oil Corp.
Whale Oil of N.J.
Whale Oil of New England
Peter J. Carini, Pres. & CEO
Anthony C. Silechia, Gen. Mgr.
C. Edwards Ross, Treasurer
Anelo J. Bianco, Asst. Gen. Mgr.
Joseph A. Vassallo, VP, Mktg.
Matthew J. Ryan, Sup. & Distrib. Mgr.

■WICKLAND OIL COMPANY

P.O. Box 13648
Sacramento, CA 95853-4648
(916) 821-1100
Key: M; G, D
Subs: Regal Stations, Inc.
Wickland Oil Terminals
J. Al Wickland Jr., Chmn.
John A. Wickland III, Pres.
Roy L. Wickland, Exec. VP
Walter P. Snelling, VP, Retail Mktg.
Robert A. Byrum, VP, Sup. & Distrib.
Daniel E. Hall, VP, Legal
Michael L. Levine, VP, Finance
James H. Williams, VP, Transport Mktg.

■WILLARD OIL CO.

2024 Howard St.
Spartanburg, SC 29304
(803) 583-5465
Key: M-Amoco; G, F, D, Lr
Subs: Willard Tire Store
Meador Oil Co., Inc.
Ben S. Willard, Pres.
William G. Willard II, VP
Mary Hutchins, Credit Mgr.
Raymond Duncan, Svc. Stn. Suprv.
Isabel S. Willard, Asst. Sec.

■A. T. WILLIAMS OIL CO.

P.O. Box 7287
Winston-Salem, NC 27109
(919) 767-6280
Key: M; G, D
A. Tab Williams Jr., Pres.
Arthur Tab Williams III, VP
Stephen T. Williams, VP
H. Frank Steelman, Sec.

■J. H. WILLIAMS OIL CO., INC.

P.O. Box 439
Tampa, FL 33601
(813) 228-7776
Key: M; G, F, D, L
Subs: Pioneer Oil Co.
76 Mini-Marts, Inc.
J. H. Williams Jr., Pres. & CEO
J. Hulon Williams III, VP
Elmer Singletary, Sales
Dorothy F. Conery, Advertising
L. Darlene Sanders, Controller

■WORLD OIL CO.

8302 S. Garfield
Southgate, CA 90280
(213) 580-6801
Key: T-R-M; G, Fw, D
Subs: World Oil Marketing
Sunland Refining
Pan Pacific
Lunday Thagard
Bernard B. Roth, CEO
Robert S. Roth, Pres.
Dale A. Snyder, Pres., Sunland Refining
Corp.
John Wm. Ricketts, Pres.,
Lunday-Thagard

■WRIGHT OIL CO.

P.O. Box 20877
El Cajon, CA 92021
(619) 563-3152
Key: M; Gw, D
William Wright, Pres.
Barbara Wright, Sec./Treas.

■WYATT, INCORPORATED

900 Chapel Street
New Haven, CT 06507
(203) 787-2175
Key: M; O-Distributor; F
Subs: The Wyatt Terminal Corp.
Wyatt Providence Terminal, Inc.
G. K. Blanchard, Chmn. of Bld.
D. F. Blanchard, Pres.
K. F. Blanchard, Exec. VP & Treas.
C. T. Krug, Sr. VP, Heavy Oil
D. B. Craft, Sr. VP, Light Oil
W. D. Temple Jr., VP
F. A. Rinaldi, VP, Opns.

■XCEL PRODUCTS CO.

2900 N. Loop West
Houston, TX 77092
(713) 688-9635
Key: M; LPGw
N. LeRoy Littlefield, Pres.
Matt Delulio, Exec. VP
John Collins, Sr. VP
A. J. Fontana, VP, Supply

■YORK OIL COMPANY, INC.

33 E. Sunset Rd., P.O. Drawer L
Hampton, VA 23666
(804) 723-3371
Key: M; G, D, L
Sub: Easy Go Stores
George M. LeCuyer, Pres.
E. Wayne Jackson Jr., VP
Charles Cunningham, Petro. Opns. Mgr.
Rick Cawthon, Store Opns.
Joe Kent, C-Store Merch. Mgr.
Wallace Gentry, Htg. Equip. Svc. Mgr.
Jim Meers, Fuel Oil Sis.

■YOUNG OIL

P.O. Box 328
Piedmont, AL 36272
(205) 447-9087
Key: M; G-Young, D
Sub: Grub Mart
Millard V. Young Jr., Pres.
Paula S. Young, VP
Martha Y. Norton, VP
Ronald D. Norton, Sec.
Ruth L. Young, Treas.

■ZARDA BROTHERS DAIRY INC.

10618 W. 63rd St.
Shawnee, KS 66203
(913) 831-5101
Key: M; G; Dr
Bernard A. Zarda, Pres.
Thomas R. Zarda, Sec./Treas.
Patrick J. Gelpt, VP

■ZEPHYR, INC.

P.O. Box 630
Muskegon, MI 49443
(616) 744-1631
Key: M; G, F, D, L
Subs: Diamond Oil Co.
Thill Oil Co.
G. G. "Ken" Tobieck, Pres. & CEO
R. Potter, Admin. Asst.
R. Dillard, VP
D. Plamondon, CFO/Treas.



GAS PUMP PRICE SIGNS

- Easy to change prices on spiral bound booklet.
- Easy to take in at night.
- Ideal for advertising messages, etc.

Write or call for catalog.

EMPRO PRODUCTS CO.

357 McLean Boulevard
Paterson, N.J. 07513
(201) 279-1010

HEADQUARTERS FOR
DECALS, SAFETY SIGNS
AND OTHER OUTSIDE SIGNS

Who, What and Where in the Capital

On this page you'll find a list of most of the agencies, Congressional committees and lawmakers in Washington responsible for energy policy important to marketers.

Department of Energy

Top-level administrators at DOE are at three different locations in Washington. Headquarters is at the James Forrestal Building, 1000 Independence Avenue, S.W. 20585, but many programs of interest to oil marketers are administered from other DOE locations at 2000 M Street N.W. 20461, and 1200 Pennsylvania Avenue N.W. 20461. Telephone numbers of key officials follow their listing below. The main DOE locator number is (202) 252-5000.

Secretary of Energy: John S. Herrington 252-6210
Deputy Secretary: Danny J. Boggs 252-5500
Special Assistant: Douglas Elmets 252-6210
Office of Policy, Planning & Analysis: William Vaughn (acting) 252-4700
Office of Environment Protection, Safety and Emergency Preparedness: Dissolved
Economic Regulatory Administration: Ray Hanzlik, Administrator 633-9734
Deputy Administrator: Marshall Staunton 252-1530
Special Counsel: Economic Regulatory Administration: Milton C. Lorenz 252-8900
Office of Settlements Division: Allen Finkel, Director 252-5665
Office of Fuel Programs: James Workman, Director 252-9356

Environmental Protection Agency

401 M-Street S.W. 20460, (202) 382-4355

Administrator: Lee T. Thomas
Deputy Administrator: Alvin Alm 382-4700
Assistant Administrator, Enforcement and Compliance Monitoring: Courtney Price 382-4134
Assistant Administrator, Administration and Resource Management: Howard Messner 382-4600
Assistant Administrator, Water: Jack Ravan 382-5700
Assistant Administrator, Solid Waste & Emergency Response: Lee Thomas 382-4610
Inspector General: John Martin 382-4945

Occupational Safety and Health Administration

Department of Labor Building, 200 Constitution Avenue N.W. 20210, (202) 523-9361

Assistant Secretary for Occupational Safety & Health: Robert A. Roland
Deputy Assistant Secretary for Occupational Safety & Health: Patrick Tyson
Directorate of Policy, Legislation & Inter-Agency Programs: Anthony Goldin 523-8021
Directorate of Safety Standards Programs: Barry White 523-8061

Federal Trade Commission

Pennsylvania Avenue at Sixth Street N.W. 20580, (202) 523-3830. Economics Bureau is at 2120 L St. N.W. 20580, (202) 634-6881.

Chairman: James C. Miller
Commissioner: Mary Avcuenaga 523-3530
Commissioner: Patricia Bailey 523-3525
Commissioner: Terry Calvani 523-3732
Commissioner: George W. Douglas 523-4503
Director, Bureau of Competition: Timothy J. Muris 523-3601

Director, Bureau of Consumer Protection: Carol T. Crawford 523-3727

Director, Bureau of Economics: Wendy Lee Graham 634-6881
Associate Director, Advertising Practices: Wallace C. Snyder 724-1511

Associate Director, Marketing Practices: William T. Golden (acting) 523-1642

Congress

Oil-industry representatives testify before many Congressional committees each year, but the bulk of legislation affecting oil marketers is handled by two committees. On the Senate side the most important is the Energy and Natural Resources Committee, chaired by Sen. James McClure (R-Idaho).

In the House, most energy action important to oil marketers will continue to take place in the Energy Conservation and Power subcommittee of the Energy and Commerce Committee.

Senate Energy and Natural Resources Committee

5D-360 Dirksen Senate Office Building, 20510, (202) 224-4971
Michael D. Hathaway, staff director.

James A. McClure (R-Idaho), Chairman
Mark O. Hatfield (R-Ore.)
Lowell P. Weicker Jr. (R-Conn.)
Pete V. Domenici (R-N.M.)
Malcolm Wallop (R-Wyo.)
John W. Warner (R-Va.)
Frank H. Murkowski (R-Ark.)
Don Nickles (R-Okla.)
Chic Hecht (R-Nev.)
Daniel Evans (D-Wash.)
J. Bennett Johnston (D-La.)
Dale Bumpers (D-Ark.)
Wendell H. Ford (D-Ky.)
Howard M. Metzenbaum (D-Ohio)
John Melcher (D-Mont.)
Bill Bradley (D-N.J.)
Jeff Bingerman (D-N.M.)
John Rockefeller (D-W.Va.)

House Energy and Commerce Committee Subcommittee on Energy Conservation and Power

H2-316 House Office Building, Annex II, 20515, (202) 226-2424
Lawrence R. Sidman, staff director.

Edward Markey, (D-Mass.), Chairman
Al Swift (D-Wash.)
Ron Wyden (D-Ore.)
Ralph M. Hall (D-Texas)
John Bryant (D-Texas)
John Dingell (D-Mich.)
Mickey Leland (D-Texas)
Richard C. Shelby (D-Ala.)
Dennis Eckart (D-Ohio)
Gerry Sikorski (D-Minn.)
Carlos Moorhead (R-Calif.)
James Broyhill (R-N.C.)
Michael Oxley (R-Ohio)
Howard C. Nielsen (R-Utah)
Michael Bilirakio (R-Fla.)
Fred Eckert (R-N.Y.)

Seen on the road again.

Fruehauf trailers.

More Fruehauf trailers ride this country's asphalt and concrete, gravel and just plain packed-down earth than any other trailers made.

And the reasons are clear. We give them the muscle to handle those roads. We put over 70 years of experience into designing and building them.

And we can fit just about any of your hauling needs with over 325 standard Fruehauf trailers, including platforms, reefers, dry freights, tanks, and dumps. We can even help clear the road to ownership by arranging financing for you.

What's more, Fruehauf has over 150 sales service and parts locations all across the country that work together to keep our trailers on the road. We back all our trailers with an exclusive 3-year warranty. And our computerized parts center reacts quickly to deliver parts for any of our trailers up to 15 years old.

Fruehauf's leadership in trailers is a result of all these things. But it's proven where it really counts — on the road. Which is where you'll see the Fruehauf name over and over and over again.

FRUEHAUF

Regional Sales Offices

CHICAGO

950 Lee Street
Des Plaines, IL 60016
Joseph C. Muench
Michael Sucharda
(312) 296-0770

NEW YORK

3936 Bailey Avenue
Riverdale, NY 10463
Michael Trerotoli
(212) 543-5854

NORTHEAST

P.O. Box 360
Salem Park, Route 22 East
Whitehouse, NJ 08888
Rick Kolinsky
(201) 534-4156

DETROIT/CLEVELAND

1204 Prosper Drive
Troy, MI 48098
Timothy P. Burke
(313) 642-4410
Bayberry Place
1840 Axtell Road, Apt. 7
Troy, MI 48084
Richard Pankratz Jr.
(313) 642-4410

ATLANTA

Dan Aldrich
3501 Cedar Valley Dr.
Smyrna, GA 30080
(404) 435-7569

DALLAS

3500 Halifax
Arlington, TX 76013
Jerry M. Hyde
(817) 277-9742

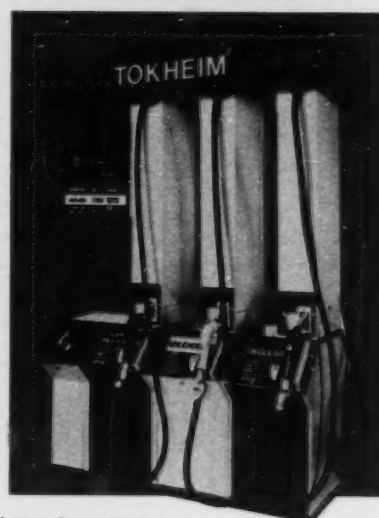
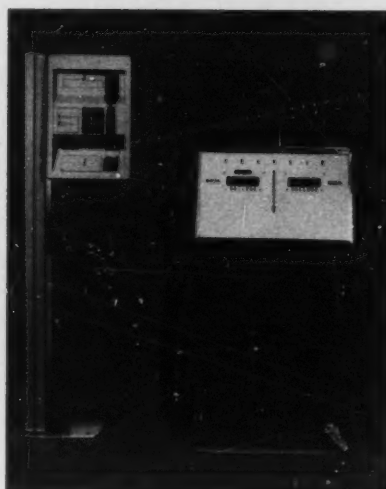
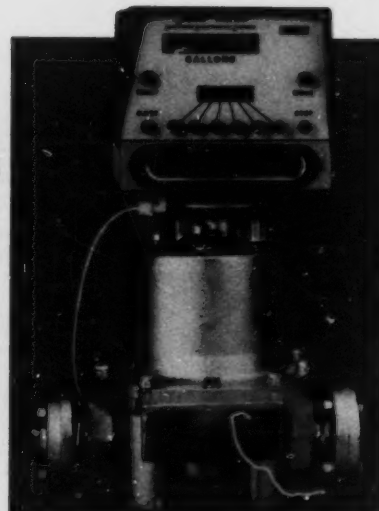
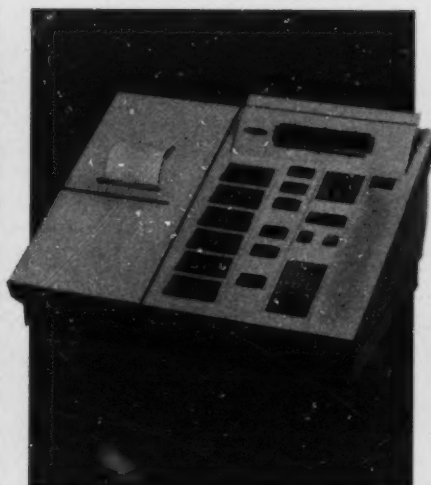
LOS ANGELES

465 E. Union Street
Suite 206
Pasadena, CA 91101
Jack Clemens
Dick Railton
(213) 681-8706
(213) 792-7064

Advertisers Index

Advanced Digital Data	19	Miller Brewing Co.	123
AFI Datatrol.	54	Monitor Inc.	194
Alladin Industries CPD	108	MPSI Systems	83
Anco Wiper Blades	74	MPC Containment	168
Anheuser-Busch.	110		
Arco Petroleum.	59	Neppco	89,108
		New York Mercantile	
Bennett Pump.	80	Exchange	158
Buffalo Tank	177	NPN Anniversary Prints	206
		N/S Corp.	96
Champion Spark Plug Co.	8	Nu-Star Car Wash	202
Citgo.	11		
Coca-Cola Co.	117	Oil Recovery Systems.	89,186
		Owens/Corning Fiberglas. .	86,87
Dayco Rubber Products			
Company.	139	JCPenney Systems	
Delco-Remy Div. General Motors		Service.	24,25
Corp.	129	Petroleum Software	
Dover/OPW.	5	Systems.	170
Dresser Wayne.	Cover 4		
Drexel Burnham Lambert.	185	Quaker State Oil Refining	
		Corp.	134
Emco Wheaton.	12		
Empro Products	208	Red Jacket Pump	109
Enraf-Nonius.	190	Reelcraft Industries, Inc.	114
Enterprise	181	Ryko Industries, Inc.	180
Executive Gift Guild.	115		
		E.W. Saybolt.	201
Ferra Pan	29	Scully	172
Ferranti Indiana	141	Shure Manufacturing.	176
Ferranti Packard.	182	A.O. Smith/Inland.	193
Financial Card Systems	17	Southwest Pump	34
Fruehauf Trucking	210	STS Systems	155
		Stalsby/Wilson Press.	67
Gilbarco, Inc.	Cover 2		
Gorman-Rupp Co.	61	Texaco	114
		Tokheim Corp. .	151,212,Cover 3
Hanna Car Wash Systems.	70		
Hannay Reels.	64	U-Haul	197
Heath Consultants, Inc.	204	Unidynamics	52
Husky Corp.	146	Union Oil	174
		Universal Valve.	3
Kendall Oil.	91		
Koppens Automatic USA Ltd. .	94	Veeder-Root	30
Keystone Structures	184		
		White Graphics Co.	188
M&M Mars.	191	William M. Wilson & Sons ...	162
May Advertising	205		
Malco Plastics	207	Xerxes	6
Mallory Pollulert	149		

more profitable
Systems for the Movement



Products & systems for: convenience store POS • card-activated control
• commercial refueling • petroleum/chemical batching & metering • fuel & liquid transfers

Talk to Tokheim
1-219-423-2552

& Measurement of Liquids.

When you need easier gas sales at the convenience store, **Talk to Tokheim**. When you want better profits at the service station, **Talk to Tokheim**.

When you're ready for total control for fleet refueling, **Talk to Tokheim**. For improved liquid handling of virtually any type, all you have to do is **Talk to Tokheim**.

Since 1901, Tokheim has persisted in giving the fuel marketing & liquid handling industries innovative new ideas. In accuracy, in dependability, in complete system ideas, Tokheim is a worldwide leader.

Only Tokheim can talk to you through over 2400 expert representatives in 600 local offices nationwide.

Talk to Tokheim and you get the benefits of on-going technical updates and training in the latest system compilations and electronics.

You get the resource of Tokheim's combined problem-solving, profit-building experience. And you get a company-wide commitment to quality products and services that's second to none.

There's a Tokheim representative close to you, and ready to talk. See listing in your Yellow Pages directory.

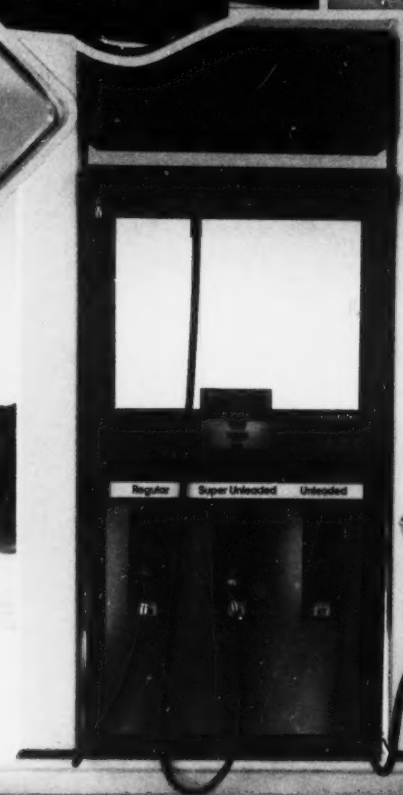
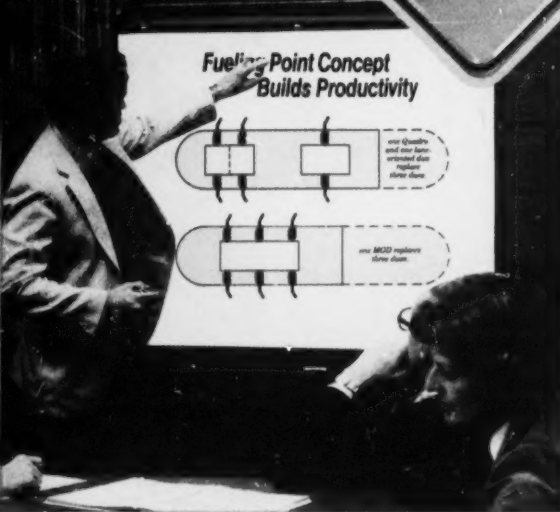
Or contact Tokheim headquarters in Fort Wayne, Indiana, for a personal review of your system needs.



TALK TO TOKHEIM and you're talking better business.



Systems for the Movement and Measurement of Liquids
TOKHEIM CORPORATION
P.O. BOX 360
FORT WAYNE, IN 46801
219/423-2532



Building your productivity.

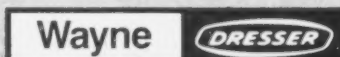
At the island, the kiosk, the convenience store, or your home office... wherever quality, productivity and reliability are essential, you'll find Wayne at work.

We are helping petroleum marketers build productivity and profits with our Wayne® Decade® 390 Multi-Grade Dispensers and our Wayne® Decade® 369/379 Quadro™ Dispensers. They pack more fueling points into less space, giving you more profit with a lower per-hose investment.

Wayne Multi-Grade Dispensers give you electronic price changing, optional customer cash/credit selection, lane-oriented nozzles, stand-alone operation, plus the ability to interface fully with Wayne Integrated Point-of-Sale Systems. And to keep you productive long into

the future, Wayne Multi-Grade Dispensers are backed by our unmatched quality assurance program.

To find out how Wayne can build your productivity, call your nearest Wayne Distributor. Or call us direct.



Wayne Division
Dresser Industries, Inc.
124 West College Avenue
P.O. Box 1859
Salisbury, MD 21801-1859
(301) 546-6600



Electronics by SPENCO DRESSER